Instruction Manual for Grantees of the Primary Care Training Enhancement Program (PCTE)

Annual Performance Report
Welcome

Welcome to the Bureau of Health Workforce’s Performance Measures Handbook (BPMH)! This instruction manual has been carefully designed to assist your organization in completing the required Performance Report for Grants and Cooperative Agreements (PRGCA). Please read through this manual carefully, as it contains examples and a series of step-by-step instructions that will aid you in completing all required forms.

1. All required performance measures are linked to the following legislative purpose(s) of the PCTE grant program:

   This announcement solicits applications for the Fiscal Year (FY) 2015 Primary Care Training and Enhancement (PCTE) program. The overarching purpose of the PCTE program is to strengthen the primary care workforce by supporting enhanced training for future primary care. In FY 2015, applicants for the PCTE program must focus on training for transforming health care systems, particularly enhancing the clinical training experience of trainees.

2. Data submitted by grantees of the program must cover all activities that took place between July 01, 2016 - June 30, 2017 (Referred to as Annual Performance Report).

3. The PRGCA is due no later than July 31, 2017. Failure to submit a PRGCA by this date may place your grant in a noncompliant status.

4. Officials at the Health Resources and Services Administration (HRSA) will review and approve all PRGCAs submitted by grantees. In the case that revisions are needed, you will be granted the ability to re-enter the BPMH system, make corrections, and submit a revised PRGCA. All revisions must be resubmitted within five (5) business days of the initial request. Failure to resubmit a revised PRGCA within five (5) business days may place your grant in a noncompliant status.

5. We appreciate your feedback and assistance during this process. If you have any questions or require further assistance in completing your PRGCA, please visit the grants homepage or contact the HRSA Contact Center. All requests for technical assistance will be coordinated through the Call Center and responded to promptly: Call Center Phone Number: 877-G04-HRSA (877-464-4722) or Call Center Online Assistance Form: click here.

Getting Started

The Office of Management and Budget (OMB) has issued a 3-year approval for the annual collection of performance measures across all grants and cooperative agreements funded through the Health Resources and Services Administration's Bureau of Health Workforces (BHW) (OMB # 09150061; Expiration Date: 06/30/2019). The BPMH system has been significantly enhanced to incorporate all approved subforms, as well as...
increase system performance and functionality. Throughout the manual, there are several icons that identify tips and other important information that will assist you in completing each subform accurately (see below).

⚠ Marks a warning statement. Please read information in **bold** carefully in order to complete each subform accurately.

💡 Marks a tip or important note for completing a specific column or subform in the BPMH system.

💡 Marks the end of a subform and provides instructions for initiating required validations checks.

Due to the nature of annual reporting, the BPMH system has been recently enhanced to prepopulate specific columns within certain subforms with data submitted in a previous reporting period. In addition, a "View Prior Period Data" link has been added at the top of each subform in order to provide you with easy access to data submitted by your organization in prior reporting periods.

![View Prior Period Data](image)

**Figure 1. Screenshot of View Prior Period Data Link**

**Getting Started - How Performance Measure Data Fields Are Identified in the Forms**
There are two (2) types of data entry field identifiers. Each data entry field in a performance measure is identified with both types of numbers when the measure appears like the example in the above Figure.

1. **Column Numbers:** The first is a Column number. It is contained in parentheses above the Block number. Column numbers are unique to the field in a particular form and are used to identify error messages. If you receive an error message, it will refer to a Column Number. In that circumstance, find the Column number in the form to locate the error. Data fields that are prepopulated may only be identified with a Column number as shown in Column #1 in the above Figure.

2. **Block Numbers:** The second type of identifier is a Block number. Block numbers are also unique to a data entry field and correspond to the paper version of the performance measures. If you print the performance measures or received paper copies, the data fields are identified with a Block number. The Block numbers here in the EHB are the same as what appears in the paper copies of the performance measures. Nearly all fields where you enter data will be identified with a Block number.
Getting Started: Browser Settings

**Warning:** Check your browser settings before beginning your PRGCA. Incompatible browsers or incorrect settings will cause forms to display incorrectly.

1. HRSA’s Electronic Handbook system (EHB) is compatible only with certain Internet browsers that have specific settings. Please check your settings by logging into EHB and clicking the ‘Recommended Settings’ tab that appears in the yellow banner at the top left of your home screen. The system will check your browser and its settings for compatibility.
2. There are multiple checks that are performed, and you must receive green check marks next to each setting in order to proceed. The following link will direct you to a page that displays the list of the checks performed: [Recommended Settings](#).
3. Opening this link in your browser will automatically perform the recommended settings checks. Alternatively, you can access the recommended settings page in the EHBs system by clicking the ‘Recommended Settings’ tab on your EHBs home screen. It is highly recommended to check your settings prior to entering data in the BPMH system.
4. Using different browsers or settings than what is described above may produce unpredictable results. If you find that you are unable to see dropdown menus, cannot enter data into a field, or a form is not appearing, you most likely have a browser compatibility problem.
5. Please check these settings prior to calling the HRSA Call Center or your Government Project Officer. You may be asked to provide a screenshot showing the results of the ‘Recommended Settings’ tab.

Getting Started: Helpful Resources and Recommendations

The following is a list of resources and tips you may find helpful in the event you need assistance:

1. Begin PRGCA data entry early and submit your report prior to the deadline.
2. **Browser Settings:** Check your Internet browser and its settings by using ‘Recommended Settings’ tab on the EHB home screen within the yellow banner in the top left corner of the screen. Look for green check marks for all system requirements in order to meet system requirements and proceed.
3. **Reporting on Your Grant:** Several resources are available through HRSA’s “Reporting on Your Grant” link [http://bhw.hrsa.gov/grants/reporting/index.html](http://bhw.hrsa.gov/grants/reporting/index.html) including general EHB guidance as well as links to the performance measures and program manual.
4. **Resource Links:** Several resources are available via the ‘Resource’ tab on the EHB home screen including the following links:
1. View Prior Period Data- Previously submitted PRGCA data are available in read-only mode
2. Glossary- Current definitions of key terms
3. Instruction Manual- Electronic copy of this program manual (can also be found on the HRSA.gov website)

5. Video Recordings:

6. Grant Personnel: Review your grant personnel listed in EHB and update this list as necessary. Ensure that listed personnel have appropriate authorizations (i.e., PRGCA submission, etc.). Make sure you have a backup person in place to submit your report!

7. Sequence of Forms: Complete PRGCA forms in the order they appear (i.e., complete EXP-1 prior to EXP-2)

8. Saving and Validating: You must click ‘Save and Validate’ in order to move to the next form. Save your work frequently (every 15-20 minutes) and print a hard copy of your report prior to submission.

9. Government Project Officers: Contact your Government Project Officer if you need further assistance on the content of your report.

10. HRSA Call Center: If you need additional assistance, contact the HRSA Call Center. If you have contacted the Call Center and are waiting for a reply, you should follow-up with them 48 hours after the initial contact. Have your ticket number ready (the same ticket number will be used at all tier levels now). Do not wait for the Call Center to return a phone call or email: Call Center Phone Number: 877-Go4HRSA/877-464-4772 or Call Center Online Assistance Form [click here](https://help.hrsa.gov/display/public/EHBSKBFG/BPMH+Videos).

Order of Required Forms

The following table shows the order that subforms will appear throughout the BPMH system for your specific grant program. Please note that clicking on the "Save and Validate" button at the end of each subform will cause the system to check all Blocks for errors and route you to the next required subform on the list. If you need to go back to any subform for any reason, simply click on the Form ID on the left sidebar of the Electronic Handbook (EHB). Please note that changing data that has already been saved will require you to click on the "Save and Validate" button and go through the validation process once more.
<table>
<thead>
<tr>
<th>Order</th>
<th>Type of Form</th>
<th>Parent Form</th>
<th>Form ID</th>
<th>Applicable Grant Purpose(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Setup Form</td>
<td>Setup Forms</td>
<td>Grant Purpose</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Setup Form</td>
<td>Setup Forms</td>
<td>Training Program</td>
<td>PCTE-1</td>
</tr>
<tr>
<td>3</td>
<td>Setup Form</td>
<td>Setup Forms</td>
<td>Faculty Development</td>
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<td>Performance Data Form</td>
<td>Program Characteristics-PC Subforms</td>
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<td>Performance Data Form</td>
<td>Program Characteristics-PC Subforms</td>
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<td>Program Characteristics-PC Subforms</td>
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<td>PCTE-1</td>
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<td>Program Characteristics-PC Subforms</td>
<td>PC-9</td>
<td>PCTE-1</td>
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<td>Legislative Requirements &amp; Demographic Variables-LR and DV Subforms</td>
<td>LR and DV Subforms</td>
<td>PCTE-1</td>
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<td>Legislative Requirements &amp; Demographic Variables-LR and DV Subforms</td>
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<td>Legislative Requirements &amp; Demographic Variables-LR and DV Subforms</td>
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<td>IND-GEN</td>
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<td>Performance Data Form</td>
<td>Individual Characteristics-INDGEN Subforms</td>
<td>INDGEN-PY</td>
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<td>Experiential Characteristics-EXP Subforms</td>
<td>EXP-1</td>
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<td>Experiential Characteristics-EXP Subforms</td>
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<td>Course Development and Enhancement-CDE Subforms</td>
<td>CDE-1</td>
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<td>PCTE-1,PCTE-2</td>
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<td>PCTE-1,PCTE-2</td>
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<td>PCTE-1,PCTE-2</td>
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<td>Continuing Education Activities-CE Subforms</td>
<td>CE-1</td>
<td>PCTE-1</td>
</tr>
<tr>
<td>Order</td>
<td>Type of Form</td>
<td>Parent Form</td>
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<td>Performance Data Form</td>
<td>Continuing Education Activities-CE Subforms</td>
<td>CE-2</td>
<td>PCTE-1</td>
</tr>
</tbody>
</table>

Primary Care Training Enhancement Program (PCTE)
Grant Purpose – Setup
Selecting Grant Purpose(s)

To configure the BPMH system, please complete the Grant Purpose Setup form by selecting the specific type(s) of activities that were supported with grant funds during the current reporting period (July 01, 2016 - June 30, 2017).

Grant Purpose

<table>
<thead>
<tr>
<th>Select</th>
<th>PCTE-1: Plan, develop, and operate a degree, fellowship or residency program in addition to infrastructure activities (curriculum)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PCTE-2: Faculty Development Programs and Activities Only (no degree, fellowship, or residency programs offered)</td>
</tr>
</tbody>
</table>

⚠️ Warning: Selections made in this form will affect the types of subforms and/or drop-down menu options that will appear throughout the BPMH system.

⚠️ Warning: Some options in the Grant Purpose form will be automatically selected based on information provided in a previous reporting period. Unselecting a grant purpose will cause related forms and data to be deleted. If you need to unselect a grant purpose, contact your project officer first to ensure you do not unnecessarily lose any data.

💡 To Complete the Form: Click on "Save and Validate" on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

Training Program - Setup

Primary Care Training Enhancement Program (PCTE)
Training Program Setup - Selecting Type of Training Program

*Add Training Program

Select Type of Training Program Offered (Click the ‘Load Program Details’ button after selecting your training program) [Load Program Details]

Add Record

Figure 4. Training Program Setup - Selecting Type of Training Program

Select Type of Training Program Offered: The Training Program Setup form will configure all sub-forms specific to the degree, fellowship, or residency program. To begin completing the setup for new records, select the type(s) of training program(s) supported with grant funds during the current reporting period by clicking on the drop-down menu next to “Select Type of Training Program Offered” and choosing one of the following options:

• Degree/Diploma/Certificate Academic Training Program (Degree/Diploma)
• Fellowship program
• Residency program

Training Program Setup - Adding Degree/Diploma Program

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

*Add Training Program

For a Degree/Diploma/Certificate Program, Select Type of Degree Offered

Select Delivery Mode Used to Offer Program

Add Record
For a Degree/Diploma/Certificate Program, Select Type of Degree Offered:

Select the type of degree program offered during the current reporting period by clicking on the drop-down menu and choosing one of the following options:

- AS • Bachelor's Degree not otherwise specified • BCHS
- BS • Certificate • DDS
- DO • MA • Master's Degree Not Otherwise Specified
- MCHS • MCMSc • MD
- MHS • MMS • MMSC
- MPA • MPAP • MPAS
- MPH • MS • MSBS
- MSHS • MSPA • MSPAS
- MSPS • Other • PharmD
- PsyD • RD • SW

Select Delivery Mode Used to Offer Program:
Select the primary delivery mode used to offer the degree program during the current reporting period by clicking on the drop-down menu and choosing one of the available options. Click on the "Add Record" button to save your entry. Repeat this process to capture each degree program supported with grant funds during the current reporting period.

- Campus-based program
- Distance learning program
- Hybrid program
Training Program Setup - Adding Fellowship Program

For a Fellowship, Residency, Practicum/Field Placement, Internship or 1-year Retraining Program, Select the Primary Discipline of Individuals Trained:

Select the primary profession/discipline of individuals by clicking on the drop-down menu and choosing one of the available options. Click on the "Add Record" button. Repeat as necessary to ensure that all new training programs are present.

- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Occupational Medicine
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Internal Medicine
- Medicine/Public Health
- Medicine - Psychiatry
- Medicine - Other - Pharmacy
- Other - Allied Health
- Other - Pharmacy
- Physician Assistant

Training Program Setup - Adding Residency Program
**Add Training Program**

<table>
<thead>
<tr>
<th>For a Fellowship, Residency, Practicum/Field Placement, Internship or 1-year Retraining Program, Select the Primary Discipline of Individuals Trained</th>
</tr>
</thead>
</table>

- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Occupational Medicine
- Medicine - Other
- Medicine - Pediatrics
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Psychiatry
- Medicine - Other - Pharmacy
- Physician Assistant
- Other - Allied Health

**Training Program Setup - Selecting Training Activity Status**
Select Training Activity Status in the Current Reporting Period: Select the status of each training program at the end of the current reporting period by choosing one of the available options.

- Active
- Inactive

Note: An "Active" training program was offered during the current reporting period.

Note: An "Inactive" training program was NOT offered during the current reporting period. Selecting ‘Inactive’ indicates that the training program is completed, you are no longer administering it, and you have no active INDGEN records associated with this program. You will not report on any aspect of an inactive program, and all records associated with the program (i.e., EXP records) will be made inactive.

To Complete the Form: Click on "Save and Validate" on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Faculty Development – Setup
Selecting Faculty Development Activities

<table>
<thead>
<tr>
<th>Faculty Development Activities</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Structured Faculty Development Training Program</td>
<td></td>
</tr>
<tr>
<td>Faculty Development Activity</td>
<td></td>
</tr>
<tr>
<td>Faculty Instruction</td>
<td></td>
</tr>
<tr>
<td>No faculty-related activities conducted</td>
<td></td>
</tr>
</tbody>
</table>

Figure 9. Selecting Faculty Development Activities

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Select Type(s) of Partners/Consortia Used to Offer this Training: Select all of the type(s) of partnerships or consortia established for the purpose of offering each degree program during the current reporting period from the drop-down menu in Column 6.

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government - Other
- Geriatric consultation services
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nursing home
- Private/For - profit organization
- Senior Center
- Academic department - within the institution
- Alzheimer’s Disease Resource Centers
- Day and home care programs (i.e. Home Health)
- Federal Government - ACL
- Federal Government - CMS
- Federal Government - IHS
- Federal Government - Other HRSA Program
- Geriatric ambulatory care and comprehensive units
- Health center (e.g.; free clinic)
- Health department - Tribal
- Health policy center
- Local Government
- Nonprofit organization
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Educational institution (Grades K - 12)
- Federal Government - AHRQ
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
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- Hospice
- Long-term care facility
- Tribal Organization

- Nurse Managed Health Clinics
- Other
- Professional Associations
- State Governmental Programs

- Physical therapy/Rehabilitation center
- Quality improvement organization
- Tribal Government

Warning: You may not select "No partners/consortia used" in combination with any other option.

Note: If you select the option "Other" please use the comment field to indicate the type of partnership used (include the certificate program name in your comment).
PC-1 - Selecting Type(s) of Community-based Collaborator(s)

Select Type of Community-based Collaborator(s): Select the type(s) of community-based collaborators used or established for the purpose of offering each program by clicking on the drop-down menu in Column 6b and choosing all that apply from the following options:

- Area Health Education Center
- Community Health Center
- Community Mental Health Center
- Critical Access Hospital
- Federally-qualified health center or look-alikes
- Other Community-Based Organization
PC-1 — Selecting Primary Discipline of Collaborative Training Program

Select Primary Discipline of Collaborative Training Program: Select the primary discipline of each collaborative training program by clicking on the drop-down menu in Column 6c and choosing one of the following options:

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
Primary Care Training Enhancement Program (PCTE)

- Dentistry - Public Health Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women's health
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Other
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Ethics
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Obstetrics and Gynecology
- Medicine - Palliative Care
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Nursing - CNL - Generalist
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - Home Health Aide
- Nursing - NP - Acute Care Pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatric
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Dietician
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Occupational Therapy
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Speech Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Injury Control & Prevention
- Nursing - CNS - Women's health and pediatrics
- Nursing - Licensed Practical/Vocational Nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency Care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse Anesthetist
Primary Care Training Enhancement Program (PCTE)

- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Optometry
- Other - Podiatry
- Other - Registered Dietician
- Other - Unknown
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- Nursing - NP - Women's health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Respiratory Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Infectious Disease Control
**PC-1 - Entering Enrollment Information**

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Enter Total # Enrolled (whether funded by BHW or not)</th>
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</thead>
<tbody>
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<td>Total</td>
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</tbody>
</table>

**Enter Total # Enrolled (whether funded by BHW or not): Total:** Enter the total number of trainees who participated in each degree program during the current reporting period in Column 7. Count all trainees who participated, regardless of whether the individual received a BHW-funded financial award.

**Enter Total # Enrolled (whether funded by BHW or not): URM:** Enter the number of trainees who were underrepresented minorities and who participated in each degree program during the current reporting period in Column 8.

**Enter Total # Enrolled (whether funded by BHW or not): Disadvantaged Background and not URM:** Enter the number of trainees from disadvantaged backgrounds who participated in the degree program during the current reporting period (but were not underrepresented minorities) in Column 9.

**Note:** For the total enrollee count (Column 7), DO include trainees who went on to graduate from the degree program in the current reporting period but do NOT include trainees who discontinued prior to graduation (i.e., attrition). Attrition counts will be captured separately in Column 12.
Note: Columns 8 and 9 are subsets of Column 7.

Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."
**PC-1 - Entering Graduate Information**

*Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.*

<table>
<thead>
<tr>
<th>Enter Total # Graduated/Completed (whether funded by BHW or not)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>URM</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>(10) Block 8</td>
<td>(11) Block 8a</td>
</tr>
</tbody>
</table>

**Figure 14. PC-1 - Entering Graduate Information**

**Enter Total # Graduated/Completed (whether funded by BHW or not): Total:** Enter the total number of trainees who graduated from or completed their training programs during the current reporting period in Column 10. Count all trainees who graduated/completed, regardless of whether the individual directly received a BHW-funded financial award.

**Enter Total # Graduated/Completed (whether funded by BHW or not): URM:** Enter the number of trainees who graduated from or completed their training program during the current reporting period and were underrepresented minorities in Column 11.

*Note: Column 10 is a subset of Column 7; Column 11 is a subset of Column 10.*

*Note: Trainees who permanently left their degree program before graduation (i.e., attrition) will be counted separately in Column 12.*

*Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."*
PC-1 - Entering Attrition Information

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Enter Total # Who left the Program Before Completion (whether funded by BHW or not)

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>URM</th>
</tr>
</thead>
<tbody>
<tr>
<td>(12) Block 9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(13) Block 9a</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 15. PC-1 - Entering Attrition Information

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): Total: Enter the total number of trainees who permanently left their training programs before completion during the current reporting period in Column 12. Count all individuals who permanently left their programs regardless of whether they directly received a BHW-funded financial award.

Enter Total # Who left the Program Before Completion (whether funded by BHW or not): URM: Enter the number of trainees who permanently left their training programs before completion during the current reporting period and were underrepresented minorities in Column 13.

Note: Column 13 is a subset of Column 12. The total entered in Column 12 is exclusive of the total number of students Column 7.

Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."

Example:
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
### PC-6: Program Characteristics – Fellowship Programs

#### PC-6 - Selecting Type(s) of Partners/Consortia

<table>
<thead>
<tr>
<th>Block 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3)</td>
</tr>
<tr>
<td>Figure 16. PC-6 - Selecting Type(s) of Partners/Consortia</td>
</tr>
</tbody>
</table>

**Select Type(s) of Partners/Consortia Used to Offer this Training:** Complete Column 3 by selecting **all** of the type(s) of partnerships or consortia used or established for the purpose of offering fellowship programs to fellows during the current reporting period.

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government - Other
- Geriatric consultation services
- Health department - State
- Health department - Tribal
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nursing home
- Private/For - profit organization
- Senior Center
- Academic department - within the institution
- Alzheimer’s Disease Resource Centers
- Day and home care programs (i.e. Home Health)
- Federal Government - ACL
- Federal Government - CMS
- Federal Government - IHS
- Federal Government - Other HRSA Program
- Geriatric ambulatory care and comprehensive units
- Health center (e.g.; free clinic)
- Health department - Local
- Health policy center
- Local Government
- Nonprofit organization
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Educational institution (Grades K - 12)
- Federal Government - AHRQ
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric Behavioral or Mental Health Units
- Health disparities research center
- Health department - Tribal
- Health policy center
- Local Government
- Nonprofit organization
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Educational institution (Grades K - 12)
- Federal Government - AHRQ
- Federal Government - Department of Defense/Military
- Federal Government - NIH
- Federal Government - SAMHSA
- Geriatric Behavioral or Mental Health Units
- Health disparities research center
Primary Care Training Enhancement Program (PCTE)

Warning: You may not select "No partners/consortia used" in combination with any other option.
PC-6 - Selecting Type(s) of Community-based Collaborator(s)

Select Type of Community-based Collaborator(s): Select the type(s) of community-based collaborators used or established for the purpose of offering each fellowship program by clicking on the drop-down menu in Column 3a and choosing all that apply from the following options:

- Area Health Education Center
- Community Health Center
- Community Mental Health Center
- Critical Access Hospital
- Federally-qualified health center or look-alikes
- Other Community-Based Organization

Figure 17. PC-6 - Selecting Type(s) of Community-based Collaborator(s)
PC-6 — Selecting Primary Discipline of Collaborative Training Program

Select Primary Discipline of Collaborative Training Program (3b)

Figure 18. PC-6 — Selecting Primary Discipline of Collaborative Training Program

Select Primary Discipline of Collaborative Training Program: Select the primary discipline of each collaborative training program by clicking on the drop-down menu in Column 3b and choosing one of the following options:

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry

Primary Care Training Enhancement Program (PCTE)
<table>
<thead>
<tr>
<th>Health Resources and Services Administration</th>
<th>Annual Performance Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bureau of Health Workforce</td>
<td>Academic Year 2016-2017</td>
</tr>
<tr>
<td>• Dentistry - Public Health Dentistry</td>
<td>• Nursing - NP - Family</td>
</tr>
<tr>
<td>• Medicine - Family Medicine</td>
<td>Psychiatric/Mental Health</td>
</tr>
<tr>
<td>• Medicine - Geriatrics</td>
<td>• Nursing - NP - Pediatric</td>
</tr>
<tr>
<td>• Medicine - Internal Medicine/Family</td>
<td>• Nursing - Nurse</td>
</tr>
<tr>
<td>Medicine</td>
<td>administrator</td>
</tr>
<tr>
<td>• Medicine - Occupational Medicine</td>
<td>• Nursing - Nurse</td>
</tr>
<tr>
<td></td>
<td>informativeist</td>
</tr>
<tr>
<td>• Medicine - Physical Medicine and</td>
<td>• Nursing - Public health</td>
</tr>
<tr>
<td>Rehabilitation</td>
<td>nurse</td>
</tr>
<tr>
<td>• Medicine - Preventive Medicine</td>
<td>• Other - Allied Health</td>
</tr>
<tr>
<td>Medicine/Occupational Medicine</td>
<td>• Other - Dietician</td>
</tr>
<tr>
<td>• Medicine - Psychiatry</td>
<td>• Other - First Responder/EMT</td>
</tr>
<tr>
<td>• Nursing - CNS - Adult gerontology</td>
<td>• Other - Lay and Family</td>
</tr>
<tr>
<td>• Nursing - CNS - Neonatal</td>
<td>Caregiver</td>
</tr>
<tr>
<td>• Nursing - CNS - Women's health</td>
<td>• Other - Occupational</td>
</tr>
<tr>
<td></td>
<td>Therapy</td>
</tr>
<tr>
<td>• Behavioral Health - Clinical Social</td>
<td>• Other - Physical Therapy</td>
</tr>
<tr>
<td>Work</td>
<td></td>
</tr>
<tr>
<td>• Behavioral Health - Other Psychology</td>
<td>• Other - Radiologic</td>
</tr>
<tr>
<td>• Dentistry - Dental Assistant</td>
<td>technology</td>
</tr>
<tr>
<td>• Dentistry - Other</td>
<td>• Other - Speech Therapy</td>
</tr>
<tr>
<td>• Medicine - Emergency Medicine</td>
<td></td>
</tr>
<tr>
<td>• Medicine - General Preventive Medicine</td>
<td>• Public Health -</td>
</tr>
<tr>
<td></td>
<td>Biostatistics</td>
</tr>
<tr>
<td>• Medicine - Integrative Medicine</td>
<td>• Public Health -</td>
</tr>
<tr>
<td></td>
<td>Epidemiology</td>
</tr>
<tr>
<td>• Medicine - Internal Medicine/Pediatrics</td>
<td>• Public Health -</td>
</tr>
<tr>
<td></td>
<td>Injury Control &amp; Prevention</td>
</tr>
<tr>
<td>• Medicine - Other</td>
<td></td>
</tr>
<tr>
<td>• Medicine - Preventive Medicine/Family</td>
<td></td>
</tr>
<tr>
<td>Medicine</td>
<td></td>
</tr>
<tr>
<td>• Nursing - Alternative/ Complementary</td>
<td></td>
</tr>
<tr>
<td>Nursing</td>
<td></td>
</tr>
<tr>
<td>• Nursing - CNS - Family</td>
<td></td>
</tr>
<tr>
<td>• Nursing - CNS - Pediatrics</td>
<td></td>
</tr>
<tr>
<td>• Behavioral Health - Counseling Psychology</td>
<td></td>
</tr>
<tr>
<td>• Behavioral Health - Other Social Work</td>
<td></td>
</tr>
<tr>
<td>Substance Abuse/Addictions Counseling</td>
<td></td>
</tr>
<tr>
<td>• Dentistry - Dental Hygiene</td>
<td></td>
</tr>
<tr>
<td>• Dentistry - Pediatric Dentistry</td>
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</tr>
<tr>
<td>• Medicine - Ethics</td>
<td></td>
</tr>
<tr>
<td>• Medicine - Geriatric Psychiatry</td>
<td></td>
</tr>
<tr>
<td>• Medicine - Internal Medicine</td>
<td></td>
</tr>
<tr>
<td>• Medicine - Obstetrics and Gynecology</td>
<td></td>
</tr>
<tr>
<td>• Medicine - Palliative Care</td>
<td></td>
</tr>
<tr>
<td>• Medicine - Preventive Medicine/Internal</td>
<td></td>
</tr>
<tr>
<td>Medicine</td>
<td></td>
</tr>
<tr>
<td>• Medicine - Preventive Medicine/Public</td>
<td></td>
</tr>
<tr>
<td>Health</td>
<td></td>
</tr>
<tr>
<td>• Nursing - CNL - Generalist</td>
<td></td>
</tr>
<tr>
<td>• Nursing - CNS - Geropsychiatric</td>
<td></td>
</tr>
<tr>
<td>• Nursing - CNS - Psychiatric/Mental health</td>
<td></td>
</tr>
<tr>
<td>• Nursing - Community health nursing</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Acute care adult gerontology</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Adult gerontology</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Family</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Neonatal</td>
<td></td>
</tr>
<tr>
<td>• Nursing - Home Health Aide</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Acute Care Pediatric</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Adult</td>
<td></td>
</tr>
<tr>
<td>• Nursing - CNS - Women's health and</td>
<td></td>
</tr>
<tr>
<td>pediatrics</td>
<td></td>
</tr>
<tr>
<td>• Nursing - Licensed</td>
<td></td>
</tr>
<tr>
<td>Practical/Vocational Nurse (LPN/LVN)</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Adult</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Emergency care</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Geropsychiatric</td>
<td></td>
</tr>
<tr>
<td>• Nursing - NP - Psychiatric/Mental health</td>
<td></td>
</tr>
<tr>
<td>• Nursing - Nurse Anesthetist</td>
<td></td>
</tr>
</tbody>
</table>
Primary Care Training Enhancement Program (PCTE)

Health Resources and Services Administration
Bureau of Health Workforce

- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Optometry
- Other - Podiatry
- Other - Registered Dietician
- Other - Unknown
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- Nursing - NP - Women's health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Respiratory Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Infectious Disease Control
PC-6 - Entering Enrollment Information

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Enter Total # Enrolled (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
</tr>
<tr>
<td>(4) Block 3</td>
</tr>
</tbody>
</table>

Figure 19. PC-6 - Entering Enrollment Information

Enter Total # Enrolled (whether funded by BHW or not): Total: Enter the total number of fellows who participated in each fellowship program during the current reporting period in Column 4. Count all fellows who participated in the fellowship program, regardless of whether the individual directly received a BHW-funded financial award.

Enter Total # Enrolled (whether funded by BHW or not): URM: Enter the number of fellows who participated in the fellowship program during the current reporting period and were underrepresented minorities in Column 5.

Enter Total # Enrolled (whether funded by BHW or not): Disadvantaged Background and not URM: Enter the number of fellows from disadvantaged backgrounds who participated in the fellowship program during the current reporting period (but were not underrepresented minorities) in Column 6.

Note: Columns 5 and 6 are subsets of Column 4.
Note: Fellows who permanently left their fellowship before completion (i.e., attrition) will be counted separately in Column 9.

Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."
**PC-6 - Entering Graduate Information**

*Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.*

<table>
<thead>
<tr>
<th>Enter Total # Graduated/Completed (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>-------------------</td>
</tr>
<tr>
<td>(7) Block 8</td>
</tr>
<tr>
<td>(8) Block 8a</td>
</tr>
</tbody>
</table>

*Note: Column 8a is a subset of Column 4; Column 8 is a subset of Column 7.*

*Note: Fellows who permanently left their fellowship before completion (i.e., attrition) will be counted separately in Column 9.*

*Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."*
**PC-6 - Entering Attrition Information**

*Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.*

<table>
<thead>
<tr>
<th>Total # Who left the Program Before Completion (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td><strong>URM</strong></td>
</tr>
<tr>
<td>(9) Block 9</td>
</tr>
<tr>
<td>(10) Block 9a</td>
</tr>
</tbody>
</table>

**Figure 21. PC-6 - Entering Attrition Information**

**Enter Total # Who left the Program Before Completion (whether funded by BHW or not): Total:** Enter the total number of fellows who permanently left their fellowship before completion during the current reporting period in Column 9. Count all fellows who permanently left their fellowships regardless of whether the individual directly received a BHW-funded financial award.

**Enter Total # Who left the Program Before Completion (whether funded by BHW or not): URM:** Enter the number of fellows who permanently left their fellowships before completion during the current reporting period and were underrepresented minorities in Column 10.

*Note: Column 10 is a subset of Column 9. The total entered in Column 9 is exclusive of the total number of enrollees (Column 4).*

*Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
PC-8: Program Characteristics – Residency Programs

PC-8 - Selecting Type(s) of Partners/Consortia

Figure 22. PC-8 - Selecting Partners/Consortia

Select Type(s) of Partners/Consortia

Select Type(s) of Partners/Consortia Used to Offer this Training

(4) Block 2

Type(s) of

Used to Offer this Training: Select established for the purpose of offering each residency program during the current reporting period 4. Choose all that apply from the following options:

- Alzheimer’s Disease Resource Centers
- Day and home care programs (i.e. Home Health)
- Federal Government - ACL
- Federal Government - CMS
- Federal Government - IHS
- Federal Government - Other HRSA Program
- Geriatric ambulatory care and comprehensive units
- Health center (e.g.; free clinic)
- Health department - Tribal
- Health policy center
- Local Government
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites

- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government - Other
- Geriatric consultation services
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nursing home
- Private/For - profit organization
- Academic department - within the institution

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - FDA
- Federal Government - Other HHS Agency/Office
- Federal Government - Other
- Geriatric consultation services
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nursing home
- Private/For - profit organization
- Academic department - within the institution
Primary Care Training Enhancement Program (PCTE)

WARNING: You may not select "No partners/consortia used" in combination with any other option.
PC-8 — Selecting Type(s) of Community-based Collaborator(s)

Select Type of Community-based Collaborator(s)

(4a)

Figure 23. PC-8 — Selecting Type(s) of Community-based Collaborator(s)

Select Type of Community-based Collaborator(s): Select the type(s) of community-based collaborators established for the purpose of offering each program by clicking on the drop-down menu in Column 4a and choosing all that apply from the following options:

- Area Health Education Center
- Community Health Center
- Community Mental Health Center
- Critical Access Hospital
- Federally-qualified health center or look-alikes
- Other Community-Based Organization
PC-8 — Selecting Primary Discipline of Collaborative Training Program

Select Primary Discipline of Collaborative Training Program: Select the primary discipline of each collaborative training program by clicking on the drop-down menu in Column 4b and choosing one of the following options:

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry

Figure 24. PC-8 — Selecting Primary Discipline of Collaborative Training Program
Health Resources and Services Administration
Bureau of Health Workforce

- Dentistry - Public Health Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Pediatrics
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Nursing - CNL - Generalist
- Nursing - CNS - Geropsychiatric
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Other
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal

- Nursing - CNS - Women's health
- Nursing - Home Health Aide
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Ethics
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Obstetrics and Gynecology
- Medicine - Palliative Care
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women's health and pediatrics
- Nursing - Licensed Practical/Vocational Nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women's health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Respiratory Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Infectious Disease Control
- Nursing - NP - Acute Care Pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatric
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
PC-8 - Entering Enrollment Information

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Enter Total # Enrolled (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
</tr>
<tr>
<td>(5) Block 3</td>
</tr>
</tbody>
</table>

**Enter Total # Enrolled (whether funded by BHW or not): Total:** Enter the total number of residents who participated in each residency program during the current reporting period in Column 5. Count all residents who participated in the residency program, regardless of whether the resident directly received a BHW-funded financial award.

**Enter Total # Enrolled (whether funded by BHW or not): URM:** Enter the number of residents who participated in the residency program during the current reporting period and were underrepresented minorities in Column 6.
Enter Total # Enrolled (whether funded by BHW or not): Disadvantaged Background and not URM: Enter the number of residents from disadvantaged backgrounds who participated in the residency program during the current reporting period (but were not underrepresented minorities) in Column 7.

Note: Column 6 and Column 7 are subsets of Column 5.

Note: Residents who permanently left their residency program before completion (i.e., attrition) will be counted separately in Column 10.

Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."

Example:
### PC-8 - Entering Graduate Information

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Enter Total # Graduated/Completed (whether funded by BHW or not)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td>(8) Block 8</td>
</tr>
</tbody>
</table>

#### Figure 26. PC-8 - Entering Graduate Information

**Enter Total # Graduated/Completed (whether funded by BHW or not): Total:** Enter the total number of residents who completed all requirements of their residency program during the current reporting period in Column 8. Count all residents who completed residency programs, regardless of whether or not the individual directly received a BHW-funded financial award.

**Enter Total # Graduated/Completed (whether funded by BHW or not): URM:** Enter the number of residents who completed all requirements of their residency program during the current reporting period and were underrepresented minorities in Column 9.

---

**Note:** Column 8 is a subset of Column 5; Column 9 is a subset of Column 8.

**Note:** Residents who permanently left their residency program before completion (i.e., attrition) will be counted separately in Column 10.

**Reference:** Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."

**Example:**
**PC-8 - Entering Attrition Information**

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

| Enter Total # Who left the Program Before Completion (whether funded by BHW or not) |
|---------------------------------|--------------------------------|
| **Total**                      | **URM**                      |
| (10) Block 9                   | (11) Block 9a                |

**Figure 27. PC-8 - Entering Attrition Information**

**Enter Total # Who left the Program Before Completion (whether funded by BHW or not): Total:** Enter the total number of residents who permanently left their residency programs before completion during the current reporting period in Column 10. Count all residents who permanently left their residency programs regardless of whether the individual directly received a BHW-funded financial award.

**Enter Total # Who left the Program Before Completion (whether funded by BHW or not): URM:** Enter the number of residents who permanently left their residency programs before completion during the current reporting period and were underrepresented minorities in Column 11.

*Note: Column 11 is a subset of Column 10. The total entered in Column 10 is exclusive of the total number of residents in Column 5.*

*Reference: Refer to the glossary for definitions of "disadvantaged background" and "underrepresented minority."

**Example:**

---

Health Resources and Services Administration  
Bureau of Health Workforce  
Annual Performance Report  
Academic Year 2016-2017  

Primary Care Training Enhancement Program(PCTE)
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
PC-9: Program Characteristics –Positions Description

PC-9 - Selecting Type of Training Program

The PC-9 form collects information about the total number of students, residents, and/or fellows in the training program by class (training) year.

<table>
<thead>
<tr>
<th>*Add Academic/Training Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Training Program</td>
</tr>
<tr>
<td>Add Record</td>
</tr>
</tbody>
</table>

Figure 28. PC-9 - Selecting Type of Training Program

**Type of Training Program:** Select a training program by clicking on the drop-down menu next to "Select Training Program" and choosing one of the available options.

**Warning:** Complete the PC-9 Setup form only if grant funds were used to support degree, residency, and/or fellowship programs other than those previously reported. You do not need to reenter information about training programs previously reported. If no new degree, residency, or fellowship programs were supported other than those previously reported, skip to PC-9 Step 3.

**Note:** The options available under "Type of Training Program" will prepopulate with information that was entered and saved in the Training Program Setup Form. To view data submitted in previous reporting periods, click on the "View Prior Period Data" link on top of the form.

PC-9 - Selecting Training Year

Primary Care Training Enhancement Program (PCTE)
Primary Care Training Enhancement Program (PCTE)

**Training Year:** Select the types of training years that apply to the training program supported through the grant by clicking on the drop-down menu next to "Select Training Year" and choosing all that apply from the available options. Click on the "Add Record" button to save your entry. **Repeat this process as necessary** to capture training years associated with each training program supported through the grant.

- Training Year 1
- Training Year 2
- Training Year 3
- Training Year 4 • Training Year 5 • Training Year 6

**PC-9 - Entering Total # of Accredited Positions**

**Enter Total # of Accredited Positions:** Enter the total number of accredited positions in each training program in the textbox in Column 3.

**Note:** Medical Schools, if your program does not have accredited positions, please report total number of medical students by graduate year in Column 3.
PC-9 - Entering Total # of Positions Filled

Enter Total # of Positions Filled: Enter the total number of student, resident, and/or fellow positions filled by training year during the annual reporting period in the textbox under Column 5 (regardless of funding source).

Note: The sum total of Column 5 across all years within a degree, residency, or fellowship program will equal the number reported in PC-1 Column 7 (for degree programs) or PC-6 Column 4 (for Fellowships) or PC-8 Column 5 (for Residency Programs).

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

Legislative Requirements & Demographic Variables—LR and DV Subforms

LR and DV - Introduction

Warning: You must complete a LR-1, LR-2, DV-1, DV-2, and DV-3 subform for each type of training program or activity that was supported through the grant during the current reporting period.
LR-1a: Trainees by Training Category
LR-1 - Entering Ongoing Trainees Count

Warning: For the LR and DV forms, enrollees and graduates must be counted separately (i.e., graduates are NOT a subset of enrollees).

Trainees by Training Category: Enter # of Ongoing Trainees: Enter the number of ongoing trainees enrolled in each training program in the textbox in Column 1a.

Note: 'Ongoing trainees' are those students, fellows, and residents who have not yet completed their training programs.

Note: Do not count individuals who permanently left a training program before graduation during the reporting period in Column 1a. These individuals will be captured separately in Column 7.

LR-1 - Entering Graduates/Program Completers Count
**Trainees by Training Category: Enter # of Graduates/ Program Completers:** Enter the aggregate number of graduates or program completers in the textbox in Column 6a.

*Note: Do not count individuals who permanently left a training program before graduation or completion during the current reporting period in Column 6a. These individuals will be captured separately in Column 7.*

**LR-1 - Entering Attrition Information**

*Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.*

<table>
<thead>
<tr>
<th>Attrition</th>
<th>Enter # of Individuals who left the Program before Completion</th>
<th>Enter # of URM who left the Program before Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block 6</td>
<td>(7)</td>
<td>(8)</td>
</tr>
</tbody>
</table>

**Attrition: Enter # of Individuals who left the Program before Completion:** Enter the total number of individuals who permanently left the training program before completion during the current reporting period (and were being supported by the grant in some manner) in the textbox in Column 7.
Attrition: Enter # of URM who left the Program before Completion: Enter the number of underrepresented minorities who permanently left the training program before completion during the current reporting period in the textbox in Column 8.

Note: Counts reported in Column 8 are a subset of those reported in Column 7.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

LR-2: Trainees by Age & gender
LR-2 - Entering Ongoing Trainees Count by Age and Gender

Warning: For the LR and DV forms, enrollees and graduates must be counted separately (i.e., graduates are NOT a subset of enrollees).

<table>
<thead>
<tr>
<th>Gender: Male</th>
<th>Gender: Female</th>
<th>Gender: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
</tr>
<tr>
<td>(2a)</td>
<td>(7a)</td>
<td>(12a)</td>
</tr>
</tbody>
</table>

Figure 35. LR-2 - Entering Ongoing Trainees Count by Age and Gender

Gender: Male: Enter # of Ongoing Trainees: Enter the number of male ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 2a.

Gender: Female: Enter # of Ongoing Trainees: Enter the number of female ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 7a.
**Gender: Not Reported: Enter # of Ongoing Trainees:** Enter the number of 'Gender: Not Reported' ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 12a.

**Warning:** For each training program, the sum of ongoing enrollees must be equal to the sum of ongoing enrollees entered in LR-1.

**LR-2 - Entering Graduates/Program Completers Count by Age and Gender**

<table>
<thead>
<tr>
<th>Gender: Male</th>
<th>Gender: Female</th>
<th>Gender: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Graduates/ Program Completers</td>
<td>Enter # of Graduates/ Program Completers</td>
<td>Enter # of Graduates/ Program Completers</td>
</tr>
<tr>
<td>(6a)</td>
<td>(11a)</td>
<td>(16a)</td>
</tr>
</tbody>
</table>

**Figure 36. LR-2 - Entering Graduates/Program Completers Count by Age and Gender**

**Gender: Male: Enter # of Graduates/ Program Completers:** Enter the number of male graduates/program completers from each training program during the current reporting period in the textbox in Column 6a.

**Gender: Female: Enter # of Graduates/ Program Completers:** Enter the number of female graduates/program completers from each training program during the current reporting period in the textbox in Column 11a.

**Gender: Not Reported: Enter # of Graduates/ Program Completers:** Enter the number of "Gender: Not Reported" graduates/program completers from each training program during the current reporting period in the textbox in Column 16a.

**Warning:** For each training program, the sum of graduates/program completers must be equal to the sum of graduates/program completers entered in LR-1.
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

**DV-1: Trainees by Racial & Ethnic Background**

**DV-1 - Entering Ongoing Trainees Count by Race and Ethnicity**

![Warning: For the LR and DV forms, enrollees and graduates must be counted separately (i.e., graduates are NOT a subset of enrollees).]

<table>
<thead>
<tr>
<th>Ethnicity: Hispanic/Latino</th>
<th>Ethnicity: Non-Hispanic/Non-Latino</th>
<th>Ethnicity: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
<td>Enter # of Ongoing Trainees</td>
</tr>
<tr>
<td>(2a)</td>
<td>(7a)</td>
<td>(12a)</td>
</tr>
</tbody>
</table>

**Figure 37. DV-1 - Entering Ongoing Trainees Count by Race and Ethnicity**

**Ethnicity: Hispanic/Latino: Enter # of Ongoing Trainees:** Enter the number of Hispanic ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 2a.

**Ethnicity: Non-Hispanic/Non-Latino: Enter # of Ongoing Trainees:** Enter the number of Non-Hispanic ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 7a.

**Ethnicity: Not Reported: Enter # of Ongoing Trainees:** Enter the number of 'Ethnicity Not Reported' ongoing trainees enrolled in each training program during the current reporting period in the textbox in Column 12a.

⚠️ **Warning:** The sum of enrollees must be equal to the sum of enrollees entered in LR-1.
**DV-1 - Entering Graduates/Program Completers Count by Race and Ethnicity**

<table>
<thead>
<tr>
<th>Ethnicity: Hispanic/Latino</th>
<th>Ethnicity: Non-Hispanic/Non-Latino</th>
<th>Ethnicity: Not Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Graduates/Program Completers</td>
<td>Enter # of Graduates/Program Completers</td>
<td>Enter # of Graduates/Program Completers</td>
</tr>
<tr>
<td>(6a)</td>
<td>(11a)</td>
<td>(16a)</td>
</tr>
</tbody>
</table>

**Figure 38. DV-1 - Entering Graduates/Program Completers Count by Race and Ethnicity**

**Ethnicity: Hispanic/Latino: Enter # of Graduates/ Program Completers:** Enter the number of Hispanic/Latino graduates/program completers from each training program during the current reporting period in the textbox in Column 6a.

**Ethnicity: Non-Hispanic/Non-Latino: Enter # of Graduates/ Program Completers:** Enter the number of Non-Hispanic/Non-Latino graduates/program completers from each training program during the current reporting period in the textbox in Column 11a.

**Ethnicity: Not Reported: Enter # of Graduates/ Program Completers:** Enter the number of 'Ethnicity Not Reported' graduates/program completers from each training program in the textbox in Column 16a.

**Warning:** For each training program, the sum of graduates/program completers must be equal to the sum of graduates/program completers entered in LR-1.

**To Complete the Form:** Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
**DV-2: Trainees from a Disadvantaged Background**

**DV-2 - Entering Ongoing Trainees Count from Disadvantaged Background**

⚠️ Warning: For the LR and DV forms, enrollees and graduates must be counted separately (i.e., graduates are NOT a subset of enrollees).

<table>
<thead>
<tr>
<th>Ongoing Trainees</th>
<th>Enter Total # from Disadvantaged Background</th>
<th>Enter # from Disadvantaged Background who are not URM</th>
</tr>
</thead>
<tbody>
<tr>
<td>(13)</td>
<td></td>
<td>(14)</td>
</tr>
</tbody>
</table>

**Figure 39. DV-2 - Entering Ongoing Trainees Count from Disadvantaged Background**

**Ongoing Trainees: Enter Total # from Disadvantaged Background:** Enter the total number of ongoing trainees from a disadvantaged background enrolled in each training program during the current reporting period in the textbox in Column 13.

**Ongoing Trainees: Enter # from Disadvantaged Background who are not URM:** Enter the number of ongoing trainees from a disadvantaged background (who are not underrepresented minorities) enrolled in each training program during the current reporting period in the textbox in Column 14.

💡 Note: Counts reported in Column 14 are a subset of counts reported in Column 13.

**DV-2 - Entering Graduates/Program Completers Count from Disadvantaged Background**
Graduates/Program Completers: Enter Total # from Disadvantaged Background: Enter the total number of graduates/program completers from disadvantaged backgrounds in each training program during the current reporting period in the textbox in Column 15.

Graduates/Program Completers: Enter # from Disadvantaged Background who are not URM: Enter the number of graduates/program completers from a disadvantaged background (who are not underrepresented minorities) in each training program in the textbox in Column 16.

Note: Counts reported in Column 16 are a subset of counts reported in Column 15.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

DV-3: Trainees from a Rural Background
DV-3 - Entering Ongoing Trainees Count from Rural Residential Background

Warning: For the LR and DV forms, enrollees and graduates must be counted separately (i.e., graduates are NOT a subset of enrollees).
Trainees from Rural Residential Background: Enter # of Ongoing Trainees from a Rural Background: Enter the number of ongoing trainees from a rural residential background enrolled in each training program during the current reporting period in the textbox in Column 8.

**DV-3 - Entering Graduates/Program Completers Count from Rural Residential Background**

<table>
<thead>
<tr>
<th>Trainees from Rural Residential Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter # of Graduates/Program Completers from a Rural Background</td>
</tr>
</tbody>
</table>

Figure 42. DV-3 - Entering Graduates/Program Completers Count from Rural Residential Background

Trainees from Rural Residential Background: Enter # of Graduates/Program Completers from a Rural Background: Enter the number of Graduates/Program Completers from a rural residential background enrolled in each training program during the current reporting period in the textbox in Column 9.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Individual-level Data—INDGEN Subforms

INDGEN - Introduction

Notice to Grantees about Individual-level Data:

- You must complete an INDGEN subform for each individual who received a BHW-funded financial award during the current reporting period.
- The INDGEN subform will automatically calculate and display read-only columns labeled “Academic Year Total” and "Cumulative BHW Financial Award Total."
- Records of individuals who were reported as having completed their training program in the previous reporting period will transfer from the INDGEN subform to the INDGEN-PY subform in the current reporting period.
IND-GEN: Individual Characteristics

IND-GEN - Setup

To begin providing individual-level data for trainees who received BHW-funded financial awards during the reporting period or to provide updates for individuals previously reported on INDGEN, click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel® form that will allow you to begin data entry.

⚠ Warning: If you are unable to enter data into the INDGEN form, edit prior records, or see drop-down menus despite the question above being answered ‘Yes’, you have a browser compatibility problem. Please refer to the Getting Started-Browser Settings page at the beginning of this manual.

IND-GEN - Selecting Type of Training Program
Type of Training Program: Select each individual's training program by clicking on the drop-down menu in Column 1 and choosing one of the available options.

Note: The options available in this drop-down menu will prepopulate with programs entered and saved in the Training Program Setup Form.
IND-GEN - Entering Trainee Unique ID

Trainee Unique ID: Enter a seven (7) alphanumeric unique identifier for each individual in the textbox in Column 2.

Warning: It is the responsibility of each grantee to keep a log of all unique IDs used, as these will be required to provide updates for each individual and one-year follow-up data for trainees.

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

IND-GEN - Selecting Individual's Training or Awardee Category

Select Individual's Training or Awardee Category

Figure 45. IND-GEN - Entering Trainee Unique ID

Figure 46. IND-GEN - Selecting Individual's Training or Awardee Category
Select Individual's Training or Awardee Category: Select each individual’s training category by clicking on the drop-down menu in Column 3 and choosing one of the following options:

- Enrollee (campus-based only)
- Enrollee (hybrid)
- Fellow
- Faculty
- Resident
- Enrollee (distance learning only)
- Fellow
- Resident

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

IND-GEN - Selecting Individual's Enrollment/Employment Status

Select Individual's Enrollment / Employment Status: Select each individual’s current enrollment or employment status by clicking on the dropdown menu in Column 4 and choosing one of the following options:

- Full-time
- On leave of absence
- Part-time

IND-GEN - Selecting Individual's Gender
Select Individual's Gender: Select each individual’s gender by clicking on the drop-down menu in Column 5 and choosing **one** of the following options:

- Female
- Male
- Not Reported

**Warning:** The ‘Not Reported’ option may not be selected for prior records.

**Note:** This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

IND-GEN - Entering Year of Birth

**Enter Year of Birth:** Select each individual’s year of birth from the drop-down menu in Column 6.
Primary Care Training Enhancement Program (PCTE)

- 1917
- 1920
- 1923
- 1926
- 1929
- 1932
- 1935
- 1938
- 1941
- 1944
- 1947
- 1950
- 1953
- 1956
- 1959
- 1962
- 1965
- 1968
- 1971
- 1974
- 1977
- 1980
- 1918
- 1921
- 1924
- 1927
- 1930
- 1933
- 1936
- 1939
- 1942
- 1945
- 1948
- 1951
- 1954
- 1957
- 1960
- 1963
- 1966
- 1969
- 1972
- 1975
- 1978
- 1981
Primary Care Training Enhancement Program (PCTE)

- 1983
- 1984
- 1985
- 1986
- 1987
- 1988
- 1989
- 1990
- 1991
- 1992
- 1993
- 1994
- 1995
- 1996
- 1997
- 1998
- 1999
- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013
- 2014
- 2015
- 2016
- 2017
- Not Reported
Select Individual's Ethnicity: Select each individual’s ethnicity by clicking on the drop-down menu in Column 7 and choosing one of the following options:

- Hispanic/Latino
- Non-Hispanic/Non-Latino
- Not Reported

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

IND-GEN - Selecting Individual's Race
Select Individual's Race: Select each individual’s race by clicking on the drop-down menu in Column 8 and choosing all that apply from the available options. You may select more than one (1) option for individuals of multiple races:

- American Indian or Alaska Native
- Asian
- Black or African-American
- Native Hawaiian or Other Pacific Islander
- White
- Not Reported

Warning: You may not select "Not Reported" in combination with any other option.

Warning: The 'Not Reported option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

IND-GEN - Selecting if Individual is from a Rural Residential Background

Select Whether Individual is from a Rural Residential Background:

Select whether each individual is from a rural residential background by clicking on the drop-down menu in Column 9 and choosing one of the following options:
**Primary Care Training Enhancement Program (PCTE)**

- Yes
- No
- Not Reported

---

**Warning:** The 'Not Reported' option may not be selected for prior records.

**Note:** This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

**Reference:** Refer to the glossary for a definition of "rural setting."

**IND-GEN - Selecting if Individual is from a Disadvantaged Background**

<table>
<thead>
<tr>
<th>Select Whether Individual is from a Disadvantaged Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>(10) Block 9</td>
</tr>
</tbody>
</table>

**Select Whether Individual is from a Disadvantaged Background:** Select whether each individual is from a disadvantaged background by clicking on the drop-down menu in Column 10 and choosing one of the following options:

- Yes
- No
- Not Reported
Primary Care Training Enhancement Program (PCTE)

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

Reference: Refer to the glossary for a definition of "disadvantaged background."

IND-GEN - Selecting Individual's Veteran Status

Select Individual's Veteran Status: Select each individual's current veteran status by clicking on the drop-down menu in Column 11 and choosing one of the following options:

- Active Duty Military
- Individual is not a Veteran
- Reservist
- Veteran - Prior Service
- Veteran - Retired
- Not Reported

Warning: The 'Not Reported' option may not be selected for prior records.

Note: This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

Reference: Refer to the glossary for a definition of the various types of veteran statuses.
### IND-GEN - Entering BHW-Funded Financial Award Information

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Select Whether Individual Received BHW Financial Award?</th>
<th>Enter Individual's Financial Award Amount (BHW funds only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(12) Block 11</td>
<td>Direct Financial Support</td>
</tr>
<tr>
<td>(20a) Block 11</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 55. IND-GEN - Entering BHW-Funded Financial Award Information**

**Select Whether Individual Received BHW Financial Award?:** Select whether each individual received a BHW-funded financial award (i.e., salary and benefits) during the current reporting period by clicking on the drop-down menu in Column 12 and choosing one of the following options:

- Yes
- No

**Enter Individual's Financial Award Amount (BHW funds only): Direct Financial Support:**
Enter the total amount of BHW dollars provided during the current reporting period in the textbox in Column 20a. If the individual did not receive a direct BHW-funded financial award, enter "0" in the textbox in Column 20a.

**Note:** The amount reported under the column labeled "Direct Financial support" should be the total monies from the grant provided to an individual during the current reporting period for the purposes of participating in the training program that was selected under the column labeled "Type of Training Program." Do not include dollars that came from other sources of funding. If an individual participated in more than one (1)
program and received salary and benefits for each program, multiple entries on INDGEN are required to capture participation and funding amounts for each program separately.
IND-GEN - Entering # of Academic Years the Individual has Received BHW Funding

Enter # of Academic Years the Individual has Received BHW Funding: Select the cumulative number of academic years in which each individual has received a BHW-funded financial award by clicking on the drop-down menu in Column 22 and choosing one of the following options:

- 1
- 2
- 3
- 4
- 5 or more

Warning: All new records should select at least one academic year of funding.

Note: The number of academic years receiving BHW-funded financial awards does not need to be consecutive; rather, the cumulative total number of years should be reported.

Note: If an individual has received money for a partial academic year, please round up to the nearest whole number. For example, if an individual has received direct financial support for 1 ½ years, please enter 2 in Column 22.

Note: If an individual received a BHW-funded financial award for the first time during the current reporting period, select "1" under Column
IND-GEN - Selecting Individual's Academic or Training Year

**Select Individual's Academic or Training Year:** Select each individual's current training year in the training program by clicking on the drop-down menu under Column 26 and choosing one of the following options:

- 1
- 2
- 3
- 4
- 5 or more
- N/A

IND-GEN - Selecting Individual's Primary Discipline
Figure 58. IND-GEN - Selecting Individual's Primary Discipline

**Select Individual's Primary Discipline:** Select individual's profession/discipline by clicking on the drop-down menu in Column 27 and choosing from the available options.

- Medicine - Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Occupational Medicine
- Medicine - Other
- Medicine - Occupational Medicine
- Medicine - Preventive Medicine
- Medicine - Preventive Medicine/Family Rehabilitation
- Medicine - Preventive Medicine/Public Medicine
- Medicine - Preventive Medicine/Internal Health
- Medicine - Psychiatry
- Physician Assistant
- Other - Allied Health

**Note:** This column will prepopulate for prior records with data submitted in the previous reporting period. Prior data cannot be altered or deleted.

**IND-GEN - Entering Training Information in a Primary Care Setting**

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Training in a Primary Care Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Whether Individual Received Training</td>
</tr>
<tr>
<td>(28) Block 17</td>
</tr>
</tbody>
</table>
Training in a Primary Care Setting: Select Whether Individual Received Training:
Select whether each individual received clinical or experiential training in a primary care setting during the current reporting period by clicking on the drop-down menu in Column 28 and choosing one of the following options:

- Yes
- No

Training in a Primary Care Setting: Enter # of Contact Hours:
Enter the total number of hours spent in this type of setting during the reporting period in the textbox in Column 29. If the individual did NOT receive clinical or experiential training in a primary care setting, leave the textbox blank in Column 29.

**IND-GEN - Entering Training Information in a Medically Underserved Area**

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.
Figure 60. IND-GEN - Entering Training Information in a Medically Underserved Area

Training in a Medically Underserved Area: Select Whether Individual Received Training: Select whether each individual received clinical or experiential training in a medically-underserved community (MUC) during the current reporting period by clicking on the drop-down menu in Column 31 and choosing one of the following options:

- Yes
- No

Training in a Medically Underserved Area: Enter # of Contact Hours:
Enter the total number of hours spent in this type of setting during the reporting period in the textbox in Column 32. If the individual did NOT receive clinical or experiential training in a medically-underserved community, leave the textbox blank in Column 32.
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

**IND-GEN - Entering Training Information in a Rural Area**

<table>
<thead>
<tr>
<th>Training in a Rural Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Whether Individual Received Training</td>
</tr>
<tr>
<td>(33) Block 19</td>
</tr>
</tbody>
</table>

**Figure 61. IND-GEN - Entering Training Information in a Rural Area**

**Training in a Rural Area: Select Whether Individual Received Training:** Select whether each individual received clinical or experiential training in a rural area during the current reporting period by clicking on the drop-down menu in Column 33 and choosing one of the following options:

- Yes
- No

**Training in a Rural Area: Enter # of Contact Hours:**

Enter the total number of hours spent in this type of setting during the reporting period in the textbox in Column 34. If the individual did NOT receive clinical or experiential training in a rural area, leave the textbox blank under Column 34.

**IND-GEN - Selecting Whether Individual Left the Program Before Completion**
Select Whether Individual Left the Program Before Completion:

Select whether each individual permanently left their training program before completion during the current reporting period by clicking on the drop-down menu in Column 36 and choosing one of the following options:

- Yes
- No

IND-GEN - Entering Graduation/Completion Information

Select Whether Individual Graduated/Completed the Program:

Select whether each individual completed from their training program during the current reporting period by clicking on the drop-down menu in Column 37 and choosing one of the following options:
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

- Yes
- No

Select Degree Earned:
If an individual graduated from their degree program during the reporting period, select the type of degree earned by clicking on the drop-down menu in Column 38 (Block 22a) and choosing one of the options from the list below. If the individual did not graduate, select "N/A" under Block 22a.

- AS
- Bachelor's Degree not otherwise specified
- BCHS
- BS
- Certificate
- DDS
- DO
- MA
- Master's Degree Not Otherwise Specified
- MCHS
- MCMSc
- MD
- MHS
- MMS
- MMSC
- MPA
- MPAP
- MPAS
- MPH
- MS
- MSBS
- MSHS
- MSPA
- MSPS
- Other
- PsyD
- RD
- N/A

Select Individual's Post-Graduation/Completion Intentions:
Select the trainee's training or employment intentions by clicking on the drop-down menu in Column 39 and choosing all that apply from the available options. If an individual did not complete their training program during the current reporting period, select “N/A” in Columns 37 and 39.

- Individual intends to apply to a primary care residency medically underserved community
- Individual intends to become employed or pursue further training in a primary care setting rural setting
- Individual intends to become employed or pursue further training in a program medically underserved community
- Individual intends to become employed or pursue further training in a training program rural setting
- MSPAS
- PharmD
- SW
- Other
- RD
- PharmD
- MSPAS
- PharmD
- SW
- Other
- RD
Warning: For Column 39, None of the above, not reported, and N/A cannot be selected in combination with any other option.

IND-GEN - Entering # of Articles Published

Enter # of Articles Published in Peer-Reviewed Journals

(44)
Block 25

Figure 64. IND-GEN - Entering # of Articles Published
Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Enter # of Articles Published in Peer-Reviewed Journals: Enter the number of articles published by each individual in peer-reviewed journals during the current reporting period in the textbox in Column 44. You may count any articles that have been accepted and are currently “in press”.
IND-GEN - Entering # of Peer-Reviewed Conference Presentations

Enter the number of peer-reviewed conference presentations each individual has made during the current reporting period in the textbox in Column 45.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
**INDGEN-PY: Individual Prior Year**

**INDGEN-PY - Entering Employment Data 1-year Post Graduation/Completion**

<table>
<thead>
<tr>
<th>Select whether status/employment data are available for the individual 1-year post graduation/completion</th>
<th>Select Individual's Current Training/Employment Status</th>
<th>Select Whether Your Organization Hired this Individual</th>
<th>Select Whether a Partner Organization Hired this Individual</th>
<th>Select Employment Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>(13) Block 23</td>
<td>(14) Block 23a</td>
<td>(16)</td>
<td>(17)</td>
<td>(18)</td>
</tr>
</tbody>
</table>

**Figure 66. INDGEN-PY - Entering Employment Data 1-year Post Graduation/Completion**

Select whether status/employment data are available for the individual 1-year post graduation/completion: Select whether current training/employment data are available for each student who received a BHW-funded financial award and completed their training program one year prior to this report by clicking on the drop-down menu in Column 13 (Block 23) and choosing one of the following options:

- Yes
- No

Select Individual's Current Training/Employment Status: Select the individual’s current training/employment status by clicking on the dropdown menu in Column 14 and choosing all that apply. If current training/employment data are not available, select “N/A” in Column 14.

- Individual is currently employed or is pursuing further training in a underserved community training in a primary care setting
- Individual is currently employed or is pursuing further medically underserved community training in a primary care setting
- Individual is currently employed or is pursuing further training in a medical underserved community training in a primary care setting
- Individual was accepted into a residency program
- Individual was accepted into a residency program rural setting program
- None of the above
Select Whether Your Organization Hired this Individual: Select whether your organization hired this individual following training program completion by clicking on the drop-down menu under Column 16 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”

Select Whether a Partner Organization Hired this Individual: Select whether a partner organization hired this individual following training program completion by clicking on the drop-down menu under Column 17 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”

- Yes
- No
- N/A

Select Employment Location: Select the type of employment location where the individual was hired following training program completion by clicking on the drop-down menu under Column 18 and choosing one of the options below. If employment data are not available for the individual, select “N/A.”

- Academic Institution
- Area Health Education Center
- Critical Access Hospital
- FQHC or Look-Alike
- Rural Health Clinic
- Other Clinical Training Site
- N/A

Warning: “None of the above” and “N/A” cannot be selected in combination with any other option.
Note: One-year post-completion employment data are not required for faculty.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

Experiential Characteristics—EXP Subforms

EXP - Introduction

1. Purpose: The EXP forms are used to characterize experiential or clinical training characteristics, including training sites and the number and profession/discipline of trainees.

   • The EXP-1 form collects information about the different clinical sites used to provide your trainees with experiential training.
   • The EXP-2 subform collects information about the profession and discipline of individuals trained at each site used during the current reporting period.

2. Order of Forms:

   • The EXP forms MUST be completed in order, otherwise drop-down menus will not populate correctly.
   • You must complete and click ‘Save and Validate’ in EXP-1 before proceeding to EXP-2.

3. Pre-population of Prior Records (training sites):

   • The BPMH system will prepopulate saved information for each previously-used site (i.e., prior record) in the EXP-1 data table.
   • You must indicate whether each previously-used site was used again during the current reporting period.

Warning: Complete the EXP-1 and EXP-2 subforms only for sites used to train individuals who appear on the LR/DV subforms.

EXP-1: Training Site Setup

EXP-1 - Entering Site Name

Warning: Complete the EXP-1 and EXP-2 subforms only for sites used to train individuals who appear on the LR/DV subforms.
Site Name:

Enter the name of the site used to train individuals during the reporting period in the textbox next to the row labeled "Enter the Site's Name." Click the “Add Record” button. Repeat this process as necessary to enter the names of all NEW sites used during the current reporting period.
EXP-1 - Selecting Whether the Site was Used in the Current Period

Select Whether the Site was Used in the Current Reporting Period: Select whether each site was used during the current reporting period by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Yes
- No

Warning: For NEW sites, you must select "Yes" in Column 2.

Note: If "No" is selected in Column 2, then the training site will not populate in the drop-down menus on the EXP-2 subform.

EXP-1 - Selecting Type of Site Used

Select Type of Site Used
Select Type of Site Used:
Select the type of site used to train individuals during the current reporting period by clicking on the drop-down menu in Column 3 and choosing one of the following options:

- Academic institution
- Aerospace operations setting
- Community-based care programs for elderly mentally challenged individuals
- Community Mental Health Center
- Dentist Office
- Federal Government Office or Agency
- Geriatric Behavioral or Mental Health Units
- Hospital
- International nonprofit/nongovernmental organization
- Long-term Care Facility
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community-based organization
- Critical Access Hospital
- Emergency Room
- FQHC or look-alike
- Geriatric consultation services
- Independent Living Facility
- Acute care services
- Assisted Living Community
- Community Health Center (CHC)
- Day and home care programs (e.g. Home Health)
- Federal and State Bureau of Prisons
- Geriatric ambulatory care and comprehensive units
- Hospice
- Indian Health Service (IHS) site
- Local health department
- National health association or affiliate
- Nurse Managed Health Clinics
- Other community health center (e.g.; free clinic)
- Program of All Inclusive Care for the Elderly
- School-based clinic
- State Government Office or Agency
- Tribal Health Department
- Local Government Office or Agency
- Mobile Clinic/Site
- Nursing Home
- Other Oral Health Facility
- Residential Living Facility
- Senior Centers
- State Health Department
- Tribal Organization
- Other
- Physician Office
- Rural Health Clinic
- Specialty clinics (e.g. mental health practice rehabilitation substance abuse clinic)
- Surgery Clinic
- Veterans Affairs Hospital or clinic
EXP-1 - Selecting Type of Setting Where the Site was Located

Select Type of Setting Where the Site was Located: Select whether each site used to train individuals during the current reporting period was located in a designated setting by clicking on the drop-down menu in Column 4 and choosing all that apply from the following options:

- Medically underserved community
- Primary Care Setting
- Rural area
- None of the above

**Warning:** “None of the above” cannot be selected in combination with any other option.

**Reference:** To determine whether a site is located in a medically underserved community, please visit HRSA’s Office of Shortage Designation at http://datawarehouse.hrsa.gov/GeoAdvisor/ShortageDesignationAdvisor.aspx.

**Reference:** To determine whether a site is located in a rural area, please visit HRSA’s Office of Rural Health Policy at http://datawarehouse.hrsa.gov/RuralAdvisor/ruralhealthadvisor.aspx.
**Select Type(s) of Partners/Consortia used to Offer Training at this Site**

| (5) |

**Figure 71. EXP-1 - Selecting Type(s) of Partners/Consortia**

Select Type(s) of Partners/Consortia used to Offer Training at this Site: Select the type(s) of partnerships or consortia used or established for the purpose of training individuals at each site during the current reporting period by clicking on the drop-down menu in Column 5 and choosing **all that apply** from the following options:

- Academic department - outside the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Educational institution (Grades K - 12)
- Federal Government - AHRQ
- Federal Government - Department of Defense / Military
- Federal Government - NIH
- Federal Government - Other HRSA Program
- Geriatric ambulatory care and comprehensive units
- Health center (e.g.; free clinic)
- Health department - Tribal
- Health policy center
- Local Government
- Nonprofit organization
- Other
- Academic department - within the institution
- Alzheimer’s Disease Resource Centers
- Area Health Education Centers
- Critical Access Hospital
- Federal Government - Veterans Affairs
- Federal Government - CDC
- Federal Government - FDA
- Federal Government - Other
- Federal Government - SAMHSA
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
- Hospice
- Long-term care facility
- Nurse Managed Health Clinics
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Day and home care programs (i.e. Home Health)
- Federal Government - ACL
- Federal Government - CMS
- Federal Government - IHS
- Federal Government - Other HHS Agency/Office
- Federally - qualified health center or look - alikes
- Geriatric consultation services
- Health department - State
- Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
- Hospital
- No partners/consortia used
- Nursing home
- Private/For - profit organization

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• Professional Associations
• Senior Center
• Tribal Organization

• Physical therapy/Rehabilitation center
• Quality improvement organization
• State Governmental Programs

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• Rural Health Clinic
• Tribal Government
Warning: You may not select "No partners/consortia used" in combination with any other option.
**EXP-1 - Selecting Type(s) of Vulnerable Population**

<table>
<thead>
<tr>
<th>Select Type(s) of Vulnerable Population Served at this Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7)</td>
</tr>
</tbody>
</table>

Figure 72. EXP-1 - Selecting Type(s) of Vulnerable Population
Select Type(s) of Vulnerable Population Served at this Site: Select the type(s) of vulnerable populations served at each site used to train individuals during the current reporting period by clicking on the drop-down menu in Column 7 and choosing all that apply from the following options:

- Adolescents
- College students
- Individuals with HIV/AIDS
- Low income persons/families
- Older adults
- Refugee Adults
- Undocumented Immigrants
- Veterans
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- Children
- Health Insurance Marketplace eligible Individuals
- Individuals with mental illness or substance use disorders
- Migrant workers

- People with disabilities
- Returning war veterans (Iraq or Afghanistan)
- Unemployed
- Victims of abuse or trauma
- Chronically ill
- Homeless individuals
- Lesbian/Gay/Bisexual/Transgender
- Military and/or military families

- Pregnant women and infants
- Tribal Population
- Uninsured/Underinsured persons/families
- None of the above

Warning: You may not select "None of the above" in combination with any other option.

EXP-1 - Entering Site's geographical Data

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
<th>Four Digit Zip Code Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>(8)</td>
<td>(9)</td>
<td>(10)</td>
<td>(11)</td>
</tr>
</tbody>
</table>

City: Enter the name of the city where each training site is located by clicking on the textbox in Column 8.

State: Enter the two-letter abbreviation for the state where each training site is located by clicking on the textbox in Column 9.

Zip Code: Enter the zip code (5 digits) where each training site is located by clicking on the textbox in Column 10.

Four Digit Zip Code Extension: Enter the four-digit zip code extension where each training site is located by clicking on the textbox in Column 11.
Note: Four-digit zip code extension information can be accessed at https://tools.usps.com/go/ZipLookupAction_input. Do not enter invalid responses or placeholder entries. If you need assistance when entering the address information for your training sites, contact your Government Project Officer for guidance.

EXP-1 - Entering Site's Payment Model

Payment Model: Select the payment model used by each training site by clicking on the drop-down menu in Column 12 and selecting all that apply from the following options:

- ACO
- CHIP
- Medicare
- Other Public
- Self - Pay
- VA
- Bundled Payments
- Dual Eligible (Medicaid & Medicare)
- Military TRICARE
- Patient Centered Medical Home
- Sliding Scale
- Workman’s Comp
- Charity Care
- Medicaid
- Other Private Insurance
- PPO
- Uninsured
- N/A
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

EXP-2: Experiential Characteristics - Trainees by Profession/Discipline
EXP-2 - Selecting Training Program and Site Name

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Type of Training Program</th>
<th>Site Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td>(2) Block 1</td>
</tr>
</tbody>
</table>

Figure 75. EXP-2 - Selecting Training Program and Site Name

**Type of Training Program:** To begin completing the EXP-2 subform, select a training program by clicking on the drop-down menu under "Type of Training Program" and choosing **one** of the available options.

**Site Name:** Select a clinical site name by clicking on the drop-down menu under Column 2 and choosing **one** of the available options.

Note: The options available under "Type of Training Program" will prepopulate with information entered and saved in the Training Program Setup Form.
**Select Profession and Discipline of Individuals Trained**

Select the profession(s)/discipline(s) of individuals trained for each training program/site combination used during the current reporting period by clicking on the drop-down menu in Column 3 and choosing one of the available options. Repeat as necessary to identify each profession/discipline of all individuals trained at each site (including interdisciplinary and interprofessional trainees who participated in team-based care). Each reported profession/discipline must be reported on a separate line even if they trained at the same site under the same program.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Public Health Dentistry
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Alternative/Complementary Nursing
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
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- Medicine - Obstetrics and Gynecology
- Medicine - Pediatrics
- Medicine - Preventive
  - Medicine/Internal Medicine
- Medicine - Preventive
  - Medicine/Public Health
- Nursing - CNL - Generalist
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work
  - Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse anesthetist
  - Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Respiratory Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Infectious Disease Control
- Student - Alternative/Complementary Nursing
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Dental Hygiene
- Student - Graduate - Nursing Doctorate
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women’s health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Occupational Therapy
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Speech Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Injury Control & Prevention
- Student - CNS - Adult gerontology
- Student - CNS - Neonatal
- Student - CNS - Women’s health
- Student - Dental School
- Student - Graduate - Nursing Masters
- Student - Graduate - Professional Counseling
- Student - Graduate - Social Work
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
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• Nursing - Nurse administrator
• Nursing - Nurse informaticist
• Nursing - Public health nurse
• Other - Allied Health
• Other - Direct Service Worker
• Other - Health Education Specialist
• Other - Medical Assistant
• Other - Optometry
• Other - Podiatry
• Other - Registered Dietician
• Other - Unknown
• Public Health - Disease Prevention & Health Promotion
• Public Health - Health Policy & Management
• Public Health - Social & Behavioral Sciences
• Student - CNS - Family
• Student - CNS - Pediatrics
• Student - Dental Assistant
• Student - Graduate - Marriage and Family Therapy
• Student - Graduate - Other
• Student - Graduate - Psychology
• Student - Health Informatics
• Student - Medical School
• Student - NP - Acute care pediatric
• Student - NP - Adult Psychiatric/Mental health
• Student - NP - Family
• Student - NP - Child/Adolescent Psychiatric/Mental Health
• Student - NP - Family Psychiatric/Mental Health
• Student - NP - Other advanced nurse specialists
• Student - NP - Women’s health
• Student - Nurse Educator
• Student - Nursing Informatics
• Student - Physician Assistant
• Student - Undergraduate - Public Health
• Student - Licensed Practical/Vocational Nurse (LPN/LVN)
• Student - NP - Acute care adult gerontology
• Student - NP - Adult gerontology
• Student - NP - Emergency care
• Student - NP - Geropsychiatric
• Student - NP - Pediatrics
• Student - Nurse Administrator
• Student - Nurse Midwife
• Student - Pharmacy School
• Student - Registered nurse (RN)
• Student - NP - Neonatal
• Student - NP - Psychiatric/Mental health
• Student - Nurse Anesthetist
• Student - Nurse Researchers/Scientists
• Student - Physical Therapy
• Student - Undergraduate - Other
**EXP-2 - Entering # Trained in the Profession and Discipline**

<table>
<thead>
<tr>
<th>Enter # Trained in this Profession and Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>(4)</td>
</tr>
<tr>
<td>Block 3</td>
</tr>
</tbody>
</table>

**Figure 77. EXP-2 - Entering # Trained in the Profession and Discipline**

**Enter # Trained in this Profession and Discipline:** For each row, enter the number of "Principal" trainees in the profession/discipline listed.

*Note: Counts provided for "Principal" trainees in Column 4 should be based on individuals reported on the LR/DV subforms.*

*Note: Do not count faculty, practicing professionals, or support staff.*
### EXP-2 - Entering # of Other Interprofessional trainees who participated in team-based care

<table>
<thead>
<tr>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>(5) Block 8</td>
</tr>
</tbody>
</table>

Figure 78. EXP-2 - Entering # of Other Interprofessional trainees who participated in team-based care

**Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care:** For each row, enter the number of all "Other Interprofessional" trainees in each profession/discipline listed.
Health Resources and Services Administration
Bureau of Health Workforce

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Note: Counts provided should be based on individuals NOT reported on the LR/DV subforms.

Note: Do not count faculty, practicing professionals, or support staff.
**EXP-2 - Adding Individuals Trained Example 1**

Example: *Principal Residents ONLY (no interprofessional trainees)*

In this example, the medical residents from the Family Medicine residency program do not have interprofessional experiences. The medical residents trained at 3 different clinical training sites. At the first site, there were 24 Family Medicine residents and no interprofessional trainees at North Regional Hospital. At the second site, there were 10 Family Medicine residents and no interprofessional trainees at Community Physicians. At the third site, there were 4 Family Medicine residents and no interprofessional trainees at the Doctor’s Clinic.

<table>
<thead>
<tr>
<th>No.</th>
<th>Type of Training Program</th>
<th>Site Name</th>
<th>Select Profession and Discipline of Individuals Trained</th>
<th>Enter # Trained in this Profession and Discipline</th>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>North Regional Hospital</td>
<td>Medicine-Family Medicine</td>
<td>24</td>
</tr>
<tr>
<td>2</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>Community Physicians</td>
<td>Medicine-Family Medicine</td>
<td>10</td>
</tr>
<tr>
<td>3</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>Doctor’s Clinic</td>
<td>Medicine-Family Medicine</td>
<td>4</td>
</tr>
</tbody>
</table>

*Figure 79. EXP-2 - Adding Individuals Trained Example 1*
EXP-2 - Adding Individuals Trained Example 2

Example: Principal AND Interprofessional Trainees

In the example on this page, the Residency in Family Medicine program trained 24 of its family medicine residents at North Regional Hospital. As part of interprofessional team-based care, the Family Medicine residency program also trained 2 Internal Medicine residents and 3 graduate students in psychology. At a second site, the Family Medicine residency trained 14 of its medical residents alongside 4 pharmacy students who were part of interprofessional team-based care.

<table>
<thead>
<tr>
<th>No.</th>
<th>Type of Training Program</th>
<th>Site Name</th>
<th>Select Profession and Discipline of Individuals Trained</th>
<th>Enter # Trained in this Profession and Discipline</th>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based care</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>North Regional Hospital</td>
<td>Medicine-Family Medicine</td>
<td>24</td>
</tr>
<tr>
<td>2</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>North Regional Hospital</td>
<td>Medicine-Internal Medicine</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>North Regional Hospital</td>
<td>Student-Graduate Psychology</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>Community Physicians</td>
<td>Medicine-Family Medicine</td>
<td>14</td>
</tr>
<tr>
<td>5</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>Community Physicians</td>
<td>Student-Pharmacy School</td>
<td>0</td>
</tr>
</tbody>
</table>

Figure 80. EXP-2 - Adding Individuals Trained Example 2
**EXP-2 - Adding Individuals Trained Example 3**

*Example: Principal AND Interprofessional Trainees*

In the example on this page, the Family Medicine residency program trained 24 of its own medical residents at North Regional Hospital. As part of interprofessional team-based care, the Family Medicine residency also trained 10 Family Medicine residents from non-HRSA funded residency programs, 2 Internal Medicine residents and 5 pharmacy students. At a second site, the Family Medicine residency trained 10 of its own medical residents alongside 8 additional Family Medicine residents from different Family Medicine residency programs as well as 4 physical therapy students who were part of interprofessional team-based care.

<table>
<thead>
<tr>
<th>No.</th>
<th>Type of Training Program</th>
<th>Site Name</th>
<th>Select Profession and Discipline of Individuals Trained</th>
<th>Enter # Trained in this Profession and Discipline</th>
<th>Enter # of Other Trainees in this Profession and Discipline Who Participated in Interprofessional Team-based Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>North Regional Hospital</td>
<td>Medicine-Family Medicine</td>
<td>24</td>
</tr>
<tr>
<td>2</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>North Regional Hospital</td>
<td>Medicine-Internal Medicine</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>North Regional Hospital</td>
<td>Student-Pharmacy School</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>Community Physicians</td>
<td>Medicine-Family Medicine</td>
<td>10</td>
</tr>
<tr>
<td>5</td>
<td>Residency</td>
<td>Family Medicine</td>
<td>Community Physicians</td>
<td>Student-Physical Therapy</td>
<td>0</td>
</tr>
</tbody>
</table>

*Figure 81. EXP-2 - Adding Individuals Trained Example 3*
**Select Type of Site Used:** Following the selection of a training site in EXP-1, the associated type of site will be automatically populated when the save and validate button is selected.
**EXP-2 - Selecting Type of Setting Where the Site was Located**

<table>
<thead>
<tr>
<th>Select Type of Setting Where the Site was Located</th>
</tr>
</thead>
<tbody>
<tr>
<td>(7)</td>
</tr>
</tbody>
</table>

**Figure 83. EXP-2 - Selecting Type of Setting Where the Site was Located**

**Select Type of Setting Where the Site was Located:** Following the selection of a training site in EXP-1, the associated settings will be automatically populated when the save and validate button is selected.

💡 To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
Course Development and Enhancement-CDE Subforms

CDE - Introduction

Purpose of CDE forms: The CDE forms are used to collect information about curriculum development and enhancement activities, including development status, delivery mode, course topic, etc. for courses offered during the current reporting period.

- CDE-1: Collects information about newly developed or enhanced courses offered during the current reporting period.
- CDE-2: Collects the number of individuals who participated in the CDE courses and training activities (grouped by course and primary discipline).

Order of Forms:

- The CDE forms MUST be completed in order, otherwise drop-down menus will not populate correctly.
- You must complete and click ‘Save and Validate’ in CDE-1 before proceeding to CDE-2.

Pre-population of Prior Records:

- The BPMH system will prepopulate saved information for each previously offered courses (i.e. “Prior Records”) in the CDE-1 data table.
- For “Prior Records” you must indicate whether the course was offered during the current reporting period.

Creation of New Records:

- The BPMH system will allow you to enter information for newly offered courses or training activities (i.e., “New Record”) in the CDE-1 data table. “New Records” will populate below all “Prior Records”
- For “New Records” you must indicate whether the course was offered during the current reporting period.
Detailed guidance on how to make the correct selections for the CDE forms be found below.

⚠️ Warning: CDE-1 must be completed and validated prior to beginning CDE-2. If you reach the CDE-2 form, and no drop-down selections appear, you have not validated both CDE-1 subform.
CDE-1: Course Development and Enhancement - Course Information

CDE-1 - Setup

To begin providing data about courses and other training activities that have been developed or enhanced through the grant or to provide updates on previously reported activities, click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel® form that will allow you to begin data entry.

Have you used BHW resources or received in-kind support to develop or enhance a course or other training activity associated with the grant?  

| Yes (complete CDE-1 and CDE-2) | No (Click Save and Validate to proceed to the next form) |

Figure 84. CDE-1 - Setup

Warning: Complete the CDE-1 Setup form only if grant funds were used to develop or enhance NEW courses or training activities other than those previously reported.

CDE-1 - Entering the Name of Course/Training Activity

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>*Add Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the Name of the Course of Training Activity that was Developed or Enhanced</td>
</tr>
</tbody>
</table>

Add Record

Figure 85. CDE-1 - Entering the Name of Course/Training Activity

Name of Course or Training Activity:
Enter the name of each course or training activity that was developed or enhanced through the grant at any point during the entire project period. All previously reported courses will be saved in the data table from your past performance reports and labeled as “Prior Records.” To report on a NEW course, enter the course name in the “Add Course” box at the top of your screen. Click ‘Add Record’ after each entry and the new courses will appear at the bottom of the data table below, in column 1. Repeat this process to enter each course or training activity that was developed or enhanced through the grant separately.

Warning: Complete the CDE-1 Setup form only if grant funds were used to develop or enhance NEW courses or training activities other than those previously reported.

CDE-1 - Selecting Type of Course or Training Activity

Select Type of Course or Training Activity: Select the type of course or training activity that was developed or enhanced through the grant by clicking on the drop-down menu under Column 2 and choosing one of the following options:
- Academic course
- Clinical rotation
- Continuing Education courses
- Faculty development programs or activities
- Field placement/practicum
- Grand rounds
- Training/Workshop for health professions students fellows or residents

CDE-1 - Selecting whether Course was Newly Developed or Enhanced
Select whether Course or Training Activity was Newly Developed or Enhanced

(3)
Block 3

Figure 87. CDE-1 - Selecting whether Course was Newly Developed or Enhanced

Select whether Course or Training Activity was Newly Developed or Enhanced: Select whether each course or training activity identified in Column 1 was newly developed or enhanced by clicking on the drop-down menu in Column 3 and choosing one of the following options:

- Enhanced
- Newly developed

Note: Select 'Newly Developed' for courses or training activities that were not in existence and were developed in their entirety through the grant.

Note: Select 'Enhanced' for courses or training activities that were in existence prior to the grant and were modified or restructured through the grant.

CDE-1 - Entering Development/Enhancement Status

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.
Select Status of Development or Enhancements: Select each course or training activity's current status by clicking on the drop-down menu in Column 4 and choosing one of the following options:

- Developed not yet implemented
- Implemented
- Under development

CDE-1 - Selecting Delivery Mode

Select Delivery Mode Used to Offer this Course or Training Activity: Select the primary mode used to deliver each course or training activity that was developed or enhanced through the grant by clicking on the drop-down menu in Column 8 and choosing one of the following options:
Primary Care Training Enhancement Program (PCTE)

- Classroom-based
- Clinical Rotation
- Distance learning (Online Webinar)
- Experiential/Field-based
- Hybrid
- Simulation-based Training

CDE-1 - Selecting Primary Topic Area

**Select Primary Topic Area:**
Select the primary topic area for each course or training activity that was developed or enhanced by clicking on the drop-down menu under Column 11 and choosing one of the following options:

- Behavioral Health - Primary Care Integration
- Behavioral Health - Suicide
- Chronic Disease - Alzheimer/Dementia
- Clinical Training - Community-Based Collaboration
- Clinical Training - Healthcare delivery systems
- Clinical Training - Public Health
- Clinical Training - Skills - Communications Skills
- Clinical Training - Technology - Other
- Infectious Disease - Other
- Population - Minority Health
- Population - Womens Health
- Setting - Primary Care
- Other-Topic Not Listed

- Behavioral Health - Substance Abuse - General
- Behavioral Health - Substance Abuse -

Figure 90. CDE-1 - Selecting Primary Topic Area
• Behavioral Health - Treatment
• Chronic Disease - Management
• Clinical Training - Cultural Competency/Health Disparities
• Clinical Training - Interprofessional education/team-based training
• Clinical Training - Quality Improvement/Patient Safety
• Clinical Training - Skills - Leadership and Management
• Clinical Training - Unspecified
• Population - Geriatric Health
• Population - Rural Health
• Population - Other
• Setting - Rural

• Opioids
• Behavioral Health - Other
• Chronic Disease - Other
• Clinical Training - Evidence-based Practice
• Clinical Training - Oral Health
• Clinical Training - Research
• Clinical Training - Technology - Simulation-based training
• Infectious Disease - HIV/AIDS
• Population - Maternal Child Health
• Population - Veterans Health
• Setting - Medically-Underserved Communities
• Setting - Other

Note: You may only choose one selection for primary topic area
Select Whether the Course or Training Activity was Offered in the Current Reporting Period:
Select whether the course or training activity that was developed or enhanced has been offered, re-offered or not offered in the current reporting period by clicking on the drop-down menu under Column 12. Listed below is guidance on which option to select.

- For “Prior Records”, courses that have been ‘Implemented’ the available options will include:
  - Not offered in the current reporting period; or
  - Re-offered in the current reporting period

- For “Prior Records”, courses that have been ‘Developed not yet implemented’ or ‘Under development’ the available options will include:
  - Not offered in the current reporting period; or
  - Offered in the current reporting period. Select “offered” if this is the first time the course has been implemented.

- For “New Records”, courses that have been ‘Implemented’, the available option will be:
  - Offered in the current reporting period.

- For “New Records”, courses that are ‘Developed not yet implemented’ or ‘Under development’, the available option will be:
  - Not offered in the current reporting period.
Primary Care Training Enhancement Program (PCTE)

- Offered
- Not Offered
- Re-offered

Note: Information on courses that were ‘Offered’ or ‘Re-offered’ will carry over onto CDE-2 form.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
CDE-2: Course Development and Enhancement - Trainees by Profession/Discipline

CDE-2 - Adding Courses and Profession/Disciplines

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

*Add Profession/Discipline

<table>
<thead>
<tr>
<th>Name of Course or Training Activity</th>
<th>Profession and Discipline of Individuals Trained</th>
</tr>
</thead>
</table>

**Name of Course or Training Activity:**

Begin by selecting the name of the course or training activity from the dropdown menu at the top of the screen. Available course names will prepopulate from the CDE-1 form. Only the names of courses that were marked as "Offered" or “Re-offered” from CDE-1 form will appear as options in the drop-down menu.

**Profession and Discipline of Individuals Trained:**

Select the profession(s) and discipline(s) of individuals trained through each course offered (or re-offered) during the current reporting period by choosing all that apply from the options listed below. Click on the "Add Record" button to save your entry. Repeat this process to capture the profession and discipline of all individuals trained in each course or training activity during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Public Health Dentistry
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
Primary Care Training Enhancement Program (PCTE)

- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Other
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - CNL - Generalist
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women’s health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Occupational Therapy
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Speech Therapy
- Public Health - Biostatistics
- Medicine - Internal Medicine
- Medicine - Obstetrics and Gynecology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Optometry
- Other - Podiatry
- Other - Registered Dietician
- Other - Unknown
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Medicine - Occupational Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
<table>
<thead>
<tr>
<th>Health Resources and Services Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bureau of Health Workforce</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Primary Care Training Enhancement Program (PCTE)</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>• Nursing - Nurse anesthetist</td>
</tr>
<tr>
<td>• Nursing - Nurse midwife</td>
</tr>
<tr>
<td>• Nursing - Registered Nurse</td>
</tr>
<tr>
<td>• Other - Chiropractor</td>
</tr>
<tr>
<td>• Other - Facility Administrator</td>
</tr>
<tr>
<td>• Other - Health Informatics/Health Information Technology</td>
</tr>
<tr>
<td>• Other - Midwife (non-nurse)</td>
</tr>
<tr>
<td>• Other - Pharmacy</td>
</tr>
<tr>
<td>• Other - Profession Not Listed</td>
</tr>
<tr>
<td>• Other - Respiratory Therapy</td>
</tr>
<tr>
<td>• Physician Assistant</td>
</tr>
<tr>
<td>• Public Health - Environmental Health</td>
</tr>
<tr>
<td>• Public Health - Infectious Disease Control</td>
</tr>
<tr>
<td>• Student - Alternative/Complementary Nursing</td>
</tr>
<tr>
<td>• Student - CNS - Geropsychiatric</td>
</tr>
<tr>
<td>• Student - CNS - Psychiatric/Mental Health</td>
</tr>
<tr>
<td>• Student - Dental Hygiene</td>
</tr>
<tr>
<td>• Student - Graduate - Nursing Masters</td>
</tr>
<tr>
<td>• Student - Graduate - Professional Counseling</td>
</tr>
<tr>
<td>• Student - Graduate - Social Work</td>
</tr>
<tr>
<td>• Student - Licensed Practical/Vocational Nurse (LPN/LVN)</td>
</tr>
<tr>
<td>• Student - NP - Acute care adult gerontology</td>
</tr>
<tr>
<td>• Student - NP - Adult gerontology</td>
</tr>
<tr>
<td>• Student - NP - Emergency care</td>
</tr>
<tr>
<td>• Student - NP - Geropsychiatric</td>
</tr>
<tr>
<td>• Student - NP - Pediatrics</td>
</tr>
<tr>
<td>• Student - Nurse Administrator</td>
</tr>
<tr>
<td>• Student - Nurse Midwife</td>
</tr>
<tr>
<td>• Student - Pharmacy School</td>
</tr>
<tr>
<td>• Student - Registered nurse (RN)</td>
</tr>
<tr>
<td>• Student - Undergraduate - Public Health</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>• Public Health - Social &amp; Behavioral Sciences</td>
</tr>
<tr>
<td>• Student - CNS - Family</td>
</tr>
<tr>
<td>• Student - CNS - Pediatrics</td>
</tr>
<tr>
<td>• Student - Dental Assistant</td>
</tr>
<tr>
<td>• Student - Graduate - Marriage and Family Therapy</td>
</tr>
<tr>
<td>• Student - Graduate - Other</td>
</tr>
<tr>
<td>• Student - Graduate - Psychology</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>• Student - Health Informatics</td>
</tr>
<tr>
<td>• Student - Medical School</td>
</tr>
<tr>
<td>• Student - NP - Acute care pediatric</td>
</tr>
<tr>
<td>• Student - NP - Adult Psychiatric/Mental health</td>
</tr>
<tr>
<td>• Student - NP - Family</td>
</tr>
<tr>
<td>• Student - NP - Neonatal</td>
</tr>
<tr>
<td>• Student - NP - Psychiatric/Mental health</td>
</tr>
<tr>
<td>• Student - Nurse Anesthetist</td>
</tr>
<tr>
<td>• Student - Nurse Researchers/Scientists</td>
</tr>
<tr>
<td>• Student - Physical Therapy</td>
</tr>
<tr>
<td>• Student - Registered Nurse - BSN</td>
</tr>
<tr>
<td>• Student - Graduate - Other Behavioral Health</td>
</tr>
<tr>
<td>• Student - Graduate - Public Health</td>
</tr>
<tr>
<td>• Student - Home Health Aide</td>
</tr>
<tr>
<td>• Student - Midwife (non - nurse)</td>
</tr>
<tr>
<td>• Student - NP - Adult</td>
</tr>
<tr>
<td>• Student - NP - Child/Adolescent Psychiatric/Mental Health</td>
</tr>
<tr>
<td>• Student - NP - Family Psychiatric/Mental Health</td>
</tr>
<tr>
<td>• Student - NP - Other advanced nurse specialists</td>
</tr>
<tr>
<td>• Student - NP - Women’s health</td>
</tr>
<tr>
<td>• Student - Nurse Educator</td>
</tr>
<tr>
<td>• Student - Nursing Informatics</td>
</tr>
<tr>
<td>• Student - Physician Informatics</td>
</tr>
<tr>
<td>• Student - Undergraduate - Other</td>
</tr>
</tbody>
</table>
**CDE-2 - Entering # Trained in the Profession and Discipline**

**Warning:** Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Enter # Trained in this Profession and Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3) Block 7</td>
</tr>
</tbody>
</table>

**Enter # Trained in this Profession and Discipline:**
For each course, enter the number of participants from the professions/disciplines you have indicated under Column 3 (Block 7). Repeat this process to capture the profession and discipline of all individuals trained in each course or training activity during the current reporting period. Once you have completed Columns 1 through 3 for all rows, click ‘Save and Validate’ to automatically populate Columns 4 through 9 with responses from CDE-1.

**CDE-2 - Selecting Type of Course or Training Activity**

<table>
<thead>
<tr>
<th>Select Type of Course or Training Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>(4) Block 2</td>
</tr>
</tbody>
</table>

**Figure 93. CDE-2 - Entering # Trained in the Profession and Discipline**

**Figure 94. CDE-2 - Selecting Type of Course or Training Activity**
Primary Care Training Enhancement Program (PCTE)
CDE-2 - Selecting whether Course was Newly Developed or Enhanced

<table>
<thead>
<tr>
<th>Select whether Course or Training Activity was Newly Developed or Enhanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>(5) Block 3</td>
</tr>
</tbody>
</table>

Figure 95. CDE-2 - Selecting whether Course was Newly Developed or Enhanced

**Select whether Course or Training Activity was Newly Developed or Enhanced:** Column 5 (Block 3), selection of whether the Course or Training Activity was Newly Developed or Enhanced will automatically populate with response from CDE-1 form.
CDE-2 - Selecting Delivery Mode

Select Delivery Mode Used to Offer this Course or Training Activity:
Column 7 (Block 6), Delivery mode will automatically populate with response from CDE-1 form.
CDE-2 - Selecting Primary Topic Area

Select Primary Topic Area:
Column 8, Primary Topic Area will automatically populate with response from CDE-1 form.
Primary Care Training Enhancement Program (PCTE)

CDE-2 - Selecting Whether the Course or Training Activity was Offered in the Current Reporting Period

<table>
<thead>
<tr>
<th>Select Whether the Course or Training Activity was Offered in the Current Reporting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>(9)</td>
</tr>
</tbody>
</table>

Figure 98. CDE-2 - Selecting Whether the Course or Training Activity was Offered in the Current Reporting Period

Select Whether the Course or Training Activity was Offered in the Current Reporting Period:
Column 9, selection of whether the course was offered will automatically populate with response from CDE-1 form.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

Faculty Development, Instruction, and Recruitment—FD Subforms
FD - Introduction

Purpose of FD Subforms:
- The FD-1 subforms collect information about the characteristics and the trainees of structured faculty development programs.
- The FD-2 subforms collect information about the characteristics and the trainees of faculty development activities.
- The FD-4 subforms collect information about the characteristics of faculty-instructed courses.
FD-1a: Faculty Development - Structured Faculty Development Training Programs
FD-1a - Adding Structured Faculty Development Programs

⚠ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>*Add Structured Faculty Development Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Name</td>
</tr>
<tr>
<td>Add Record</td>
</tr>
</tbody>
</table>

Figure 99. FD-1a - Adding Structured Faculty Development Programs

**Program Name:** Enter the name of each new structured faculty development program coordinated and/or supported through the grant during the current reporting period. Next, select "Add Record." Repeat this process as necessary to enter each new structured faculty development program that was coordinate and/or supported through the grant during the current reporting period.

⚠ Warning: If a previously-completed program (prior record) is being offered again with a new cohort, it will need to be re-created as a new record

**Example:**

FD-1a - Selecting Program Status

<table>
<thead>
<tr>
<th>Select Program Status in the Current Reporting Period</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

(1a)

Figure 100. FD-1a - Selecting Program Status
Select Program Status in the Current Reporting Period: Select the status of each structured faculty development program at the end of the current reporting period by clicking on the drop-down menu in Column 1a and choosing one of the following options:

- Complete
- Ongoing

Note: Select 'Ongoing' if the training program did not conclude by the end of the current reporting period.

Note: Select 'Complete' if the training program concluded at some point during the current reporting period.

FD-1a - Entering Program Information for Degree/Non-Degree Programs

<table>
<thead>
<tr>
<th>Select Whether this was a Degree Bearing Program</th>
<th>For Degree-bearing Programs</th>
<th>For Non-Degree Bearing Program, Enter Length of Training Program in Clock Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>(2) Block 2</td>
<td>Select Type of Degree Offered</td>
<td>(5) Block 3</td>
</tr>
<tr>
<td></td>
<td>Select Primary Focus Area</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(3) Block 2a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(4) Block 2b</td>
<td></td>
</tr>
</tbody>
</table>

Figure 101. FD-1a - Entering Program Information for Degree/Non-Degree Programs

Select Whether this was a Degree Bearing Program: Select whether each structured faculty development program that was supported through the grant during the current reporting period culminates in awarding participants with a professional certificate or academic degree by clicking on the drop-down menu in Column 2 and choosing one of the following options:
For Degree-bearing Programs: Select Type of Degree Offered:

- If you selected "Yes" in Column 2, select the type of degree that participants will earn when completing each program by clicking on the drop-down menu in Column 3 and choosing one of the options below.
- If you selected "No" in Column 2, select "N/A" in Column 3.

- Certificate
- Post-Masters Certificate
- N/A

For Degree-bearing Programs: Select Primary Focus Area:

- If you selected "Yes" in Column 2, select the primary focus area of the degree-bearing structured faculty development program by clicking on the drop-down menu in Column 4 and choosing one of the options below.
- If you selected "No" in Column 2, select "N/A" in Column 4.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Public Health Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women's health and pediatrics
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
Health Resources and Services Administration
Bureau of Health Workforce

• Medicine - General Preventive Medicine
• Medicine - Integrative Medicine
• Medicine - Internal Medicine/Pediatrics
• Medicine - Other Medicine - Preventive Medicine/Pediatrics
• Nursing - Alternative/Complementary Nursing
• Nursing - CNS - Family Nursing - CNS - Pediatrics
• Nursing - CNS - Women’s health
• Nursing - Licensed Practical/Vocational Nurse (LPN/LVN)
• Nursing - NP - Adult
• Nursing - NP - Emergency care
• Nursing - NP - Geropsychiatric
• Behavioral Health - Counseling Psychology
• Behavioral Health - Other Social Work
• Substance Abuse/Addictions Counseling
• Dentistry - Dental Hygiene
• Dentistry - Pediatric Dentistry
• Medicine - Ethics
• Medicine - Geriatric Psychiatry
• Medicine - Internal Medicine

• Medicine - Obstetrics and Gynecology
• Medicine - Palliative Care
• Medicine - Preventive Medicine/Internal Medicine
• Medicine - Preventive Medicine/Public Health
• Nursing - CNL - Generalist
• Nursing - CNS - Geropsychiatric Nursing - CNS - Psychiatric/Mental health
• Nursing - Community health nursing
• Nursing - NP - Acute care adult gerontology
• Nursing - NP - Adult gerontology
• Nursing - NP - Family
• Nursing - NP - Neonatal
• Nursing - NP - Women’s health
• Nursing - Nurse Educator
• Nursing - Other (e.g. CNA PCA)
• Nursing - Researcher/Scientist
• Other - Community Health Worker (CHW)
• Nursing - NP - Family Psychiatric/Mental Health
• Nursing - NP - Pediatrics
• Nursing - Nurse Administrator
• Nursing - Nurse Informaticist
• Nursing - Public Health Nurse
• Other - Allied Health
• Other - Dietician

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• Other - First Responder/EMT
• Other - Lay and Family Caregiver
• Other - Occupational Therapy
• Other - Physical Therapy
• Other - Radiologic technology
• Other - Speech Therapy
• Physician Assistant
• Public Health - Environmental Health
• Public Health - Infectious Disease Control
• N/A

• Nursing - NP - Psychiatric/Mental health
• Nursing - Nurse Anesthetist
• Nursing - Nurse Midwife
• Nursing - Registered Nurse (RN)
• Other - Chiropractor
• Other - Direct Service Worker
• Other - Health Education Specialist
• Other - Medical Assistant
• Other - Optometry
• Other - Podiatry
• Other - Registered Dietician
• Other - Unknown
• Public Health - Biostatistics
• Public Health - Epidemiology
• Public Health - Injury Control & Prevention

• Other - Facility Administrator
• Other - Health Informatics/Health Information Technology

Primary Care Training Enhancement Program (PCTE)
For Non-Degree Bearing Program, Enter Length of Training Program in Clock Hours:

- If you selected "Yes" in Column 2, enter a zero ("0") in Column 5.
- If you selected "No" in Column 2, enter the length of each non-degree bearing structured faculty development program in clock hours in the textbox in Column 5.

FD-1a - Entering % of Time Spent Developing Competencies in Different Roles

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

Enter the % of Time Spent Developing Competencies for the Following Roles:

<table>
<thead>
<tr>
<th>Clinician</th>
<th>Administrator</th>
<th>Educator</th>
<th>Researcher</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block 5</td>
<td>Block 5</td>
<td>Block 5</td>
<td>Block 5</td>
</tr>
<tr>
<td>(6)</td>
<td>(7)</td>
<td>(8)</td>
<td>(9)</td>
</tr>
</tbody>
</table>

Figure 102. FD-1a - Entering % of Time Spent Developing Competencies in Different Roles

Enter the % of Time Spent Developing Competencies for the Following Roles: Clinician: Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Clinician' in Column 6.

Enter the % of Time Spent Developing Competencies for the Following Roles: Administrator: Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Administrator' in Column 7.
Enter the % of Time Spent Developing Competencies for the Following Roles: Educator: Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Educator' in Column 8.

Enter the % of Time Spent Developing Competencies for the Following Roles: Researcher: Enter the percentage of time spent in each structured faculty development program developing competencies associated with 'Researcher' in Column 9.

Note: Percentages of time spent across the faculty four roles must total 100%.

FD-1a - Entering # of Faculty Who Completed the Program

Enter # of Faculty Who Completed the Program:

- If a program was marked as “Complete” in Column 1a, enter the number of faculty who completed each structured faculty development program during the current reporting period in the textbox in Column 10.
- If you selected “Ongoing” in Column 1a, enter a zero (“0”) in the textbox in Column 10.
FD-1a - Selecting whether Faculty Received BHW-Funded Financial Award

Select whether any Faculty Received any type of BHW-Funded Financial Award during the Training Program: Select whether any faculty who participated in a training program received any type of BHW-funded financial award during the current reporting period by clicking on the drop-down menu in Column 11 and choosing **one** of the following options:

- Yes
- No

**Warning:** You must complete an INDGEN subform for each faculty who received a BHW-funded financial award during the current reporting period for participating in a structured faculty development program.

**To Complete the Form:** Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-1b: Faculty Development - Faculty Trained By Profession/Discipline
FD-1b - Adding Profession and Discipline for Structured Programs

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>*Add Training Program and Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Name</td>
</tr>
<tr>
<td>Select Profession and Discipline of Faculty Trained</td>
</tr>
</tbody>
</table>

**Program Name**: Select a program name by clicking on the drop-down menu next to "Program Name" and choosing one of the available options (available options will be those entered and saved in the FD-1a subform).

**Profession and Discipline of Faculty Trained**: Select the profession(s)/discipline(s) of all faculty members who participated in each structured faculty development program during the current reporting period by choosing all that apply from the options below. Next, select “Add Record.” Repeat this process to capture the profession/discipline of all faculty members who participated in each structured faculty development program during the current reporting period.  
- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Public Health Dentistry
- Medicine - General Preventive Medicine
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Obstetrics and Gynecology
- Behavioral Health - Counseling Psychology

Primary Care Training Enhancement Program (PCTE)
Primary Care Training Enhancement Program (PCTE)

- Behavioral Health - Other Social Work
- Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Occupational Therapy
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Speech Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatric
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Optometry
- Other - Podiatry
- Other - Registered Dietician
- Other - Unknown
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse anesthetist
- Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Respiratory Therapy
- Physician Assistant
Primary Care Training Enhancement Program (PCTE)

- Public Health - Environmental Health
- Public Health - Injury Control & Prevention
- Public Health - Infectious Disease Control
FD-1b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline: For each structured faculty development program, enter the number of faculty in each profession/discipline who participated in the program during the current reporting period in the textbox in Column 3. Repeat this step as many times as necessary to capture the total number of faculty by profession/discipline who participated in each structured faculty development program during the current reporting period.

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

FD-2a: Faculty Development - Faculty Development Activities

FD-2a - Entering Faculty Development Activities

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.
**Activity Name:** Enter the name of each new faculty development activity coordinated and/or supported through the grant during the current reporting period in Column 1. Next, select “Add Record.” Repeat this process as necessary to enter each new faculty development activity that was coordinated and/or supported through the grant during the current reporting period.

*Warning:* If a previously completed program (prior record) is being offered again with a new cohort, it will need to be re-created as a new record

**FD-2a - Selecting Type of Faculty Development Activity Offered**

*Warning:* Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Select Type of Faculty Development Activity Offered</th>
<th>For Courses or Workshops</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select Whether Activity is Accredited for Continuing Education Credit</td>
</tr>
<tr>
<td>(2) Block 8</td>
<td>(3) Block 8a</td>
</tr>
</tbody>
</table>

*Figure 108. FD-2a - Selecting Type of Faculty Development Activity Offered*

**Select Type of Faculty Development Activity Offered:** Select the type of faculty development activity supported and/or coordinated through the grant during the current reporting period by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Academic Course for Continuing Education
- Clinical Rotation for Continuing Education
- Grand Rounds for Continuing Education
- Professional Conference
For Courses or Workshops: Select Whether Activity is Accredited for Continuing Education Credit:

- For Clinical Rotations and Grand Rounds for Continuing Education, as well as Professional Conferences (as selected in Column 2), select N/A for Column 3.
- **For Academic Courses and Trainings/Workshops for Continuing Education (as selected in Column 2),** select whether these activities are accredited for continuing education credit by clicking on the drop-down menu in Column 3 and choosing one of the following options:
  - Yes
  - No
  - N/A

For Courses or Workshops: Select Whether Attendance was to Acquire or Maintain Professional Certification:

- For Clinical Rotations and Grand Rounds for Continuing Education, as well as Professional Conferences (as selected in Column 2), select N/A for Column 4.
- **For Academic Courses and Trainings/Workshops for Continuing Education (as selected in Column 2, Block 8),** select whether attendance by faculty was for the purposes of acquiring or maintaining a professional certification by clicking on the drop-down menu under Column 4 and choosing one of the following options:
  - Yes
  - No
  - N/A

**FD-2a - Entering Duration of Training Activity**
Enter Duration of Training Activity in Clock Hours: 
Enter the duration (in clock hours) of each faculty development activity in the textbox in
Column 5.

*Note: For activities less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60. (e.g., a 15-minute course would entered as 15/60 = .25.)*

FD-2a - Selecting Delivery Mode

Select Delivery Mode Used to Offer Training Activity: Select the primary delivery mode used to offer each faculty development activity by clicking on the drop-down menu in Column 6 and choosing one of the following options:
FD-2a - Selecting Faculty Role(s)

Select the Faculty Role(s) Addressed at Training Activity

Select the Faculty Role(s) Addressed at Training Activity:

Select the faculty role(s) addressed in each faculty development activity by clicking on the drop-down menu in Column 7 and choosing all that apply from the following options:

- Administrator
- Clinician
- Educator
- Researcher

To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-2b: Faculty Development - Faculty Trained By Profession/Discipline

FD-2b - Adding Profession and Discipline for Activities

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

$$\begin{array}{|c|c|}
\hline
*Add Activity Name and Discipline \\
Activity Name \\
Select Profession and Discipline of Faculty Trained \\
Add Record \\
\hline
\end{array}$$

Figure 112. FD-2b - Adding Profession and Discipline for Activities

**Activity Name:** Select an activity name by clicking on the drop-down menu next to "Activity Name" and choosing one of the available options (available options will be those entered and saved in the FD-2a subform).

**Profession and Discipline of Faculty Trained:** Select the profession(s)/discipline(s) of all faculty who participated in each faculty development activity during the current reporting period by choosing all that apply from the options below. Next, select “Add Record.” Repeat this process to capture the profession/discipline of all faculty who participated in each faculty development activity during the current reporting period.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Public Health Dentistry
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine
- Medicine - Obstetrics and Gynecology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Substance Abuse/Addictions Counseling
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Behavioral Health - Clinical Social Work
Primary Care Training Enhancement Program (PCTE)

- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Medicine - Internal Medicine/Pediatrics
- Medicine - Other Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Nursing - CNL - Generalist
- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women’s health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Occupational Therapy
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Speech Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatric
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Optometry
- Other - Podiatry
FD-2b - Entering # Trained in the Profession and Discipline

**Enter # Trained in this Profession and Discipline**

![Table](image)

**Figure 113. FD-2b - Entering # Trained in the Profession and Discipline**

**Enter # Trained in this Profession and Discipline**: Enter the number of faculty in each profession/discipline who participated in the faculty development activity during the current reporting period in the textbox in Column 3. Repeat this step as many times as necessary to capture the total number of faculty by profession/discipline who participated in each faculty development activity during the current reporting period.

💡 **To Complete the Form**: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
FD-4a: Faculty Development - Faculty Instruction
FD-4a - Adding Faculty Instructional Activities

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

*Add Courses/Workshops
Enter the Name of the Course or Workshop Offered by the Faculty

Add Record

Figure 114. FD-4a - Adding Faculty Instructional Activities

Name of the Course or Workshop Offered by the Faculty: Enter the name of an instructional activity offered during the current reporting period in the textbox next to "Enter the Name of the Course or Workshop Offered by the Faculty". Next, click on the "Add Record" button to save your entry. Repeat this process to capture all instructional activities offered during the current reporting period.

💡 Warning: Only complete the Setup for new instructional activities. The FD-4a subform will prepopulate the name of instructional activities previously reported. If no new instructional activities were offered other than those previously reported, skip to the next page.

FD-4a - Selecting Whether the Course was Offered in the Current Period
### Select Whether the Course/Workshop was Offered in the Current Reporting Period

<table>
<thead>
<tr>
<th>(1a)</th>
<th></th>
</tr>
</thead>
</table>

**Figure 115. FD-4a - Selecting Whether the Course was Offered in the Current Period**

**Select Whether the Course/Workshop was Offered in the Current Reporting Period:** Select whether each instructional activity was offered during the current reporting period by clicking on the drop-down menu in Column 1a and choosing **one** of the following options:

- Yes
- No

**Warning:** For new records, you must select "Yes" under Column 1a.

**Warning:** If "Yes" is selected for a prior record, then the remaining Blocks in the FD-4a subform must be completed. If "No" is selected for a prior records, do not complete any other columns in the FD-4 subform.
Select the Content Area Of the Course or Workshop: Select the content area of each instructional activity offered by faculty during the current reporting period by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Gerontological nursing
- Health care and older adults
- Health information technology
- Health literacy
- Health Reform/Health Insurance
- Healthy aging
- Marketplaces
- Hispanics
- Hepatitis
- Homelessness
- Home health
- Incontinence
- Hypertension
- Injury prevention
- Influenza
- Interpersonal skills
- Interdisciplinary training
- Interprofessional team training
• Interprofessional integrated models of care • Malnutrition
• Long-Term Care • Medication basics
• Medical ethics • Mental health and older adults
• Mental health • Multiple Chronic Diseases
• Minority Health • Obesity
• Nutrition/healthy eating • Other simulated or virtual methods
• Palliative care • Pastoral/Spiritual Care
• Perioperative care • Personal care skills
• Physical activity/active lifestyles • Polypharmacy
• Prevention/Primary care • Primary care
• Health Disparities
• Health Promotion and disease prevention
• Pulmonary Disease
• Rehabilitation
• Rural Health
• Sexually transmitted infections
• Suicide
• Tertiary care
• Trauma
• Urgent care
• Violence
• Wound care
• Quality Improvement
• Rehabilitation Therapies
• Sensory Loss
• Stroke
• Sustainability
• Tobacco cessation
• Tuberculosis
• Veteran Related
• Virtual simulation

• Heart disease • HIV/AIDS
• Hospice Care
• Infection control
• Interactive simulated case studies
• Interprofessional Education
• Lesbian/Gay/Bisexual/Transgender individuals
• Mannequin-based and patient simulators
• Medications/drugs
• Migrant health initiatives
• Native Hawaiian/Pacific Islander health
• Oral health
• Pain management
• Patient safety (medical errors)
• Pharmacology
• Prescription drug abuse
• Program evaluation
• Quality improvement and patient safety
• Renal Disease
• Sexual health
• Substance Abuse
• Telemedicine/telehealth
• Transitional care
• Urban health
• Veterans Health
• Women's health
FD-4a - Entering Course/Workshop Length

Enter the Length of the Course or Workshop in Clock Hours: Enter the duration, in clock hours, of each instructional activity offered during the current reporting period in the textbox in Column 3.

Note: For courses less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60 (e.g., a 15-minute course would entered as 15/60 = .25).
Note: For instructional activities offered via distance learning, enter the intended duration of each activity in this Column.

Note: This Column will prepopulate for prior records with data submitted in the previous reporting period.

**FD-4a - Entering # of Times the Course or Workshop was Offered**

<table>
<thead>
<tr>
<th>Enter # of Times the Course or Workshop was Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>(4) Block 20</td>
</tr>
</tbody>
</table>

**Figure 118. FD-4a - Entering # of Times the Course or Workshop was Offered**

**Enter # of Times the Course or Workshop was Offered:** Enter the number of times each instructional activity was offered by faculty during the current reporting period in the textbox in Column 4.
FD-4a - Selecting Delivery Mode

Select the Delivery Mode Used to Offer the Course or Workshop: Select the delivery mode used to offer each instructional activity during the current reporting period by clicking on the drop-down menu in Column 5 and choosing one of the following options:

- Archived/Self-paced distance learning
- Classroom-based
- Clinical Rotation
- Hybrid
- Other
- Real-time/Live distance learning
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

FD-4b: Faculty Development - Faculty Trained by Profession/Discipline
FD-4b - Adding Profession and Discipline for Faculty Instructional Activities

Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>*Add Profession/Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of the Course or Workshop Offered by the Faculty</td>
</tr>
<tr>
<td>Profession and Discipline of Individuals Trained</td>
</tr>
</tbody>
</table>

Figure 120. Adding and Faculty Activities

FD-4b - Profession Discipline for Instructional
Name of the Course or Workshop Offered by the Faculty: Select a course name by clicking on the drop-down menu next to "Course or Workshop Offered by the Faculty" and choosing one of the available options.

Profession and Discipline of Individuals Trained: To add information about the profession/discipline of individuals trained through each instructional activity offered during the current reporting period, select an instructional activity by clicking on the drop-down menu next to "Name of the Course of Workshop Offered by the Faculty" and choosing one of the available options.

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Public Health Dentistry
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Obstetrics and Gynecology
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work, Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Medicine - Internal Medicine/Pediatrics
- Medicine - Other
- Medicine - Preventive Medicine/Internal Medicine
- Medicine - Preventive Medicine/Public Health
- Nursing - CNL - Generalist
Primary Care Training Enhancement Program (PCTE)

- Nursing - CNS - Geropsychiatric
- Nursing - CNS - Psychiatric/Mental health
- Nursing - Community health nursing
- Nursing - NP - Acute care adult gerontology
- Nursing - NP - Adult gerontology
- Nursing - NP - Family
- Nursing - NP - Neonatal
- Nursing - NP - Women’s health
- Nursing - Nurse educator
- Nursing - Other (e.g. CNA PCA)
- Nursing - Researcher/Scientist
- Other - Community Health Worker
- Other - First Responder/EMT
- Other - Lay and Family Caregiver
- Other - Occupational Therapy
- Other - Physical Therapy
- Other - Radiologic technology
- Other - Speech Therapy
- Public Health - Biostatistics
- Public Health - Epidemiology
- Public Health - Injury Control & Prevention
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Nursing - CNS - Women’s health
- Nursing - Home Health Aide
- Nursing - NP - Acute care pediatric
- Nursing - NP - Adult Psychiatric/Mental health
- Nursing - NP - Family Psychiatric/Mental Health
- Nursing - NP - Pediatrics
- Nursing - Nurse administrator
- Nursing - Nurse informaticist
- Nursing - Public health nurse
- Other - Allied Health
- Other - Direct Service Worker
- Other - Health Education Specialist
- Other - Medical Assistant
- Other - Optometry
- Other - Podiatry
- Other - Registered Dietician
- Other - Unknown
- Public Health - Disease Prevention & Health Promotion
- Public Health - Health Policy & Management
- Public Health - Social & Behavioral Sciences
- Student - CNS - Family
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Nursing - Licensed practical/vocational nurse (LPN/LVN)
- Nursing - NP - Adult
- Nursing - NP - Emergency care
- Nursing - NP - Geropsychiatric
- Nursing - NP - Psychiatric/Mental health
- Nursing - Nurse anesthetist • Nursing - Nurse midwife
- Nursing - Registered Nurse
- Other - Chiropractor
- Other - Facility Administrator
- Other - Health Informatics/Health Information Technology
- Other - Midwife (non-nurse)
- Other - Pharmacy
- Other - Profession Not Listed
- Other - Respiratory Therapy
- Physician Assistant
- Public Health - Environmental Health
- Public Health - Infectious Disease Control
- Student - Alternative/Complementary Nursing
- Student - CNS - Geropsychiatric
- Student - CNS - Psychiatric/Mental health
- Student - Dental Hygiene
- Student - Graduate - Nursing Doctorate
- Student - Graduate - Other Behavioral Health
- Student - Graduate - Public Health
- Student - Home Health Aide
- Student - Midwife (non - nurse)
- Student - CNS - Adult gerontology
- Student - CNS - Neonatal
- Student - CNS - Women’s health
Primary Care Training Enhancement Program (PCTE)

- Student - Dental School
- Student - Graduate - Nursing Masters
- Student - Graduate - Professional Counseling
- Student - Graduate - Social Work
- Student - Licensed Practical/Vocational Nurse (LPN/LVN)
- Student - Midwife (non-nurse)
- Student - NP - Adult
- Student - NP - Child/Adolescent Psychiatric/Mental Health
- Student - NP - Family Psychiatric/Mental Health
- Student - NP - Other advanced nurse specialists
- Student - NP - Women’s health
- Student - Nurse Educator
- Student - Nursing Informatics
- Student - Physician Assistant
- Student - Undergraduate - Other
- Student - CNS - Pediatrics
- Student - Dental Assistant
- Student - Graduate - Marriage and Family Therapy
- Student - Graduate - Other
- Student - Graduate - Psychology
- Student - Health Informatics
- Student - Medical School
- Student - NP - Acute care adult gerontology
- Student - NP - Adult gerontology
- Student - NP - Emergency care
- Student - NP - Geropsychiatric
- Student - NP - Pediatrics
- Student - Nurse Administrator
- Student - Nurse Midwife
- Student - Pharmacy School
- Student - Registered nurse (RN)
- Student - Undergraduate - Public Health
- Student - NP - Acute care pediatric
- Student - NP - Adult Psychiatric/Mental health
- Student - NP - Family
- Student - NP - Neonatal
- Student - NP - Psychiatric/Mental health
- Student - Nurse Anesthetist
- Student - Nurse Researchers/Scientists
- Student - Physical Therapy
- Student - Registered Nurse - BSN
FD-4b - Entering # Trained in the Profession and Discipline

Enter # Trained in this Profession and Discipline

(3)
Block 21

Figure 121. FD-4b - Entering # Trained in the Profession and Discipline

**Enter # Trained in this Profession and Discipline:** Enter the number of individuals trained in each profession/discipline during the current reporting period in the textbox in Column 3.

💡 **To Complete the Form:** Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.

**Continuing Education Activities—CE Subforms**

**CE - Introduction**

1. **Purpose:**
• The CE subforms are used to characterize continuing education course characteristics as well as the number and profession/discipline of trainees.

• The CE-1 form captures information about the continuing education courses and training activities offered in the current reporting period.

• The CE-2 subform collects information about the profession and discipline of individuals trained in the offered CE courses or training activities.

2. Order of Subforms:

• CE subforms MUST be completed in order, otherwise drop-down menus will not prepopulate correctly.

• You must complete and ‘Save and Validate’ CE-1 first before proceeding to CE-2.

3. Pre-population of Prior Records (CE Courses) reported previously:

• Each reporting period, the CE-1 form will appear blank.

• The ONLY courses or activities to be entered are those that were offered during the current reporting period.

To view data submitted in the previous reporting period, click on the "View Prior Data" link.

**CE-1: Continuing Education - Course Characteristics and Content**

**CE-1 - Setup**

To begin providing information about continuing education courses offered during this reporting period or to provide updates on courses previously offered, click "Yes" to the initial setup question. Clicking "Yes" will activate the embedded Excel® form that will allow you to begin data entry.
Figure 122. CE-1 - Setup
CE-1 - Entering Course Title

Course Title: To begin completing the CE-1 subform for new records, enter the name of each course offered under Column 1 of the CE-1 subform.

Note: Course titles are limited to 200 characters.

Note: To view data submitted in the previous reporting period, click on the "View Prior Period Data" link on top of the form.
CE-1 - Selecting Whether Course is Approved for Continuing Education Credit

Select Whether Course is Approved for Continuing Education Credit: Select whether each course is accredited for continuing education credit by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Yes
- No

CE-1 - Entering Course Duration
Enter the Duration of the Course in Clock Hours: Enter the duration, in clock hours, of each course offered during the current reporting period in the textbox under Column 3.

Note: For courses that lasted for less than one (1) hour, provide a decimal value by dividing the total number of minutes the course lasted by 60 (e.g., a 15-minute course would entered as 15/60 = .25.)

CE-1 - Entering # of Times Course was Offered
Figure 126. CE-1 - Entering # of Times Course was Offered

**Enter # of Times Course was Offered:** Enter the total number of times the course was offered during the current reporting period in the textbox in Column 4.

*Note: For instructional activities offered via archived/self-paced distance learning on an ongoing basis, enter "9999".*
**CE-1 - Selecting Delivery Mode**

**Select Delivery Mode Used to Offer Course:** Select the primary delivery mode used to offer each course during the current reporting period by clicking on the drop-down menu in Column 5 and choosing **one** of the following options:

- Archived/Self-paced Distance Learning
- Classroom-based
- Hybrid
- Other
- Real-time/Live distance learning

![Figure 127. CE-1 - Selecting Delivery Mode](image-url)
### Select Type(s) of Partnership(s) Established for the Purposes of Delivering this Course:

Select the type(s) of partnerships or consortia established for the purposes of delivering each course by clicking on the drop-down menu in Column 6 and choosing **all that apply** from the following options:

- Academic department - outside the institution
- Acute Care for the Elderly (ACE) Units
- Ambulatory practice sites
- Community Health Center (CHC)
- Educational institution (Grades K - 12)
- Federal Government - CDC
- Federal Government - IHS
- Federal Government - Other HHS Agency/Office
- Federal Government - Veterans Affairs
- Geriatric Behavioral or Mental Health Units
- Health department - Local
- Health disparities research center
- Hospice
- Long - Term Care Facility
- Nurse Managed Health Clinics
- Academic department - within the institution
- Alzheimer’s Association/Chapters
- Area Agencies on Aging
- Community Mental Health Center
- Federal Government - ACL
- Federal Government - Department of Defense/Military
• Federal Government - NIH
• Federal Government - Other HRSA Program
• FQHC or look-alike
• Geriatric consultation services
• Health department - State
• Health insurance/Healthcare Provider Group (e.g.; PPO/HMO)
• Hospital
• Physical therapy/Rehabilitation center
• Quality improvement organization
• Tribal Government

• No partners/consortia used
• Nursing Home
• Private/For-profit organization
• Academic institution
• Alzheimer’s Disease Resource Centers
• Community-based health center (e.g.; free clinic)
• Day and home care programs (i.e. Home Health)
• Federal Government - AHRQ
• Senior Center
• Tribal Organization

Warning: You may not select "No partners/consortia used" in combination with any other option.
CE-1 - Entering Employment Location Data for Individuals Trained

⚠️ Warning: Multiple steps are required to complete this portion of the subform. Please read instructions carefully.

<table>
<thead>
<tr>
<th>Select Whether Employment Location Data are Available for Individuals Trained</th>
<th>Enter # of Individuals Trained by Employment Location (not mutually exclusive)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Care Setting</td>
<td>Medically Underserved Community</td>
</tr>
<tr>
<td>(8) Block 9</td>
<td>(9) Block 9a</td>
</tr>
</tbody>
</table>

**Figure 129. CE-1 - Entering Employment Location Data for Individuals Trained**

**Select Whether Employment Location Data are Available for Individuals Trained:** Select whether employment location data are available for trainees who participated in each course during the current reporting period by clicking on the drop-down menu in Column 8 and choosing one of the following options:

- Yes
- No

**Enter # of Individuals Trained by Employment Location (not mutually exclusive): Primary Care Setting:**
Enter the total number of participants who are employed in a primary care setting in Column 9. If none of the participants are employed in this setting, enter "0" in Column 9.
Enter # of Individuals Trained by Employment Location (not mutually exclusive): Medically Underserved Community: Enter the total number of participants who are employed in a medically underserved community in Column 10. If none of the participants are employed in this setting, enter "0" in Column 10.

Enter # of Individuals Trained by Employment Location (not mutually exclusive): Rural Area: Enter the total number of participants who are employed in a rural area in Column 11. If none of the participants are employed in this setting, enter "0" in Column 11.

Note: Individuals can be counted multiple times if their place of employment is located in more than one type of designated setting. As a result, counts provided under Columns 9, 10 and 11 are not meant to be mutually exclusive.
Select the Course's Primary Topic Area: Select the primary topic area addressed in each course offered during the current reporting period by clicking on the drop-down menu in Column 12 and choosing one of the following options:

- Behavioral Health - Primary Care Integration
- Behavioral Health - Suicide
- Chronic Disease - Alzheimer/Dementia
- Clinical Training - Community-Based Collaboration
- Clinical Training - Healthcare delivery systems
- Clinical Training - Public Health
- Clinical Training - Skills - Communications Skills
- Clinical Training - Technology - Other
- Infectious Disease - Other
- Population - Minority Health
- Population - Women's Health
- Setting - Primary Care
- Other - Topic Not Listed
- Behavioral Health - Substance Abuse - General
  - Behavioral Health - Substance Abuse - Opioids
- Chronic Disease - Management
- Clinical Training - Cultural Competency/Health Disparities
- Clinical Training - Interprofessional education/team-based training
- Clinical Training - Quality Improvement/Patient Safety
- Clinical Training - Skills - Leadership and Management
- Clinical Training - Unspecified
- Population - Geriatric Health
- Population - Rural Health
- Population - Other
- Setting - Rural
- Behavioral Health - Substance Abuse - Treatment
- Behavioral Health - Other
- Chronic Disease - Other
- Clinical Training - Evidence-based Practice
- Clinical Training - Oral Health
- Clinical Training - Research
- Clinical Training - Technology - Simulation-based training
- Infectious Disease - HIV/AIDS
- Population - Maternal Child Health
- Population - Veterans Health
- Setting - Medically-Underserved Communities
- Setting - Other
To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, the BPMH system will automatically route you to the next required subform.
# CE-2: Continuing Education - Individuals Trained by Profession/Discipline

## CE-2 - Selecting Profession and Discipline of Individuals Trained

**Figure 131. CE-2 - Discipline of Individuals**

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Select Profession and Discipline of Individuals Trained</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Block 1</td>
<td>(2) Block 8</td>
</tr>
</tbody>
</table>

**Course Title:** Enter the course title in the textbox under Column 1.

**Select Profession and Discipline of Individuals Trained:** Select the profession/discipline of trainees who participated in each course by clicking on the drop-down menu in Column 2 and choosing one of the following options:

- Behavioral Health - Clinical Psychology
- Behavioral Health - Marriage and Family Therapy
- Behavioral Health - Pastoral/Spiritual Care
- Dentistry - General Dentistry
- Dentistry - Public Health Dentistry
- Medicine - General Preventive Medicine
- Medicine - Integrative Medicine
- Medicine - Internal Medicine/Pediatrics
- Medicine - Other
- Medicine - Preventive Medicine/Internal Medicine
- Behavioral Health - Clinical Social Work
- Behavioral Health - Other Psychology
- Dentistry - Dental Assistant
- Dentistry - Other
- Medicine - Emergency Medicine
- Medicine - Geriatric Psychiatry
- Medicine - Internal Medicine
- Medicine - Obstetrics and Gynecology
- Medicine - Physical Medicine and Rehabilitation
- Medicine - Preventive Medicine/Occupational Medicine
- Medicine - Psychiatry
- Nursing - CNS - Adult gerontology
- Nursing - CNS - Neonatal
- Behavioral Health - Counseling Psychology
- Behavioral Health - Other Social Work
- Substance Abuse/Addictions Counseling
- Dentistry - Dental Hygiene
- Dentistry - Pediatric Dentistry
- Medicine - Family Medicine
- Medicine - Geriatrics
- Medicine - Internal Medicine/Family Medicine
- Medicine - Occupational Medicine
- Medicine - Preventive Medicine/Family Medicine
- Medicine - Preventive Medicine/Pediatrics
- Nursing - Alternative/Complementary Nursing
- Nursing - CNS - Family
- Nursing - CNS - Pediatrics
- Nursing - CNS - Women’s health and pediatrics
- Medicine - Preventive
<table>
<thead>
<tr>
<th>Profession and Discipline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicine/Public Health</td>
</tr>
<tr>
<td>Nursing - CNL - Generalist</td>
</tr>
<tr>
<td>Nursing - CNS - Geropsychiatric</td>
</tr>
<tr>
<td>Nursing - CNS - Psychiatric/Mental health</td>
</tr>
<tr>
<td>Nursing - Community health nursing</td>
</tr>
<tr>
<td>Nursing - NP - Acute care adult gerontology</td>
</tr>
<tr>
<td>Nursing - NP - Adult gerontology</td>
</tr>
<tr>
<td>Nursing - NP - Family</td>
</tr>
<tr>
<td>Nursing - NP - Neonatal</td>
</tr>
<tr>
<td>Nursing - NP - Women’s health</td>
</tr>
<tr>
<td>Nursing - Nurse educator</td>
</tr>
<tr>
<td>Nursing - Other (e.g. CNA PCA)</td>
</tr>
<tr>
<td>Nursing - Researcher/Scientist</td>
</tr>
<tr>
<td>Other - Community Health Worker</td>
</tr>
<tr>
<td>Other - First Responder/EMT</td>
</tr>
<tr>
<td>Other - Lay and Family Caregiver</td>
</tr>
<tr>
<td>Other - Occupational Therapy</td>
</tr>
<tr>
<td>Other - Physical Therapy</td>
</tr>
<tr>
<td>Other - Radiologic technology</td>
</tr>
<tr>
<td>Other - Speech Therapy</td>
</tr>
<tr>
<td>Public Health - Biostatistics</td>
</tr>
<tr>
<td>Public Health - Epidemiology</td>
</tr>
<tr>
<td>Public Health - Injury Control &amp; Prevention</td>
</tr>
<tr>
<td>Nursing - CNS - Women’s health</td>
</tr>
<tr>
<td>Nursing - Home Health Aide</td>
</tr>
<tr>
<td>Nursing - NP - Acute care pediatric</td>
</tr>
<tr>
<td>Nursing - NP - Adult Psychiatric/Mental health</td>
</tr>
<tr>
<td>Nursing - NP - Family Psychiatric/Mental Health</td>
</tr>
<tr>
<td>Nursing - NP - Pediatrics</td>
</tr>
<tr>
<td>Nursing - Nurse administrator</td>
</tr>
<tr>
<td>Nursing - Nurse informaticist</td>
</tr>
<tr>
<td>Nursing - Public health nurse</td>
</tr>
<tr>
<td>Other - Allied Health</td>
</tr>
<tr>
<td>Other - Direct Service Worker</td>
</tr>
<tr>
<td>Other - Health Education Specialist</td>
</tr>
<tr>
<td>Other - Medical Assistant</td>
</tr>
<tr>
<td>Other - Optometry</td>
</tr>
<tr>
<td>Other - Podiatry</td>
</tr>
<tr>
<td>Other - Registered Dietician</td>
</tr>
<tr>
<td>Other - Unknown</td>
</tr>
<tr>
<td>Public Health - Disease Prevention &amp; Health</td>
</tr>
<tr>
<td>Public Health - Health Policy &amp; Management</td>
</tr>
<tr>
<td>Public Health - Social &amp; Behavioral Sciences</td>
</tr>
<tr>
<td>Nursing - Licensed practical/vocational nurse (LPN/LVN)</td>
</tr>
<tr>
<td>Nursing - NP - Adult</td>
</tr>
<tr>
<td>Nursing - NP - Emergency care</td>
</tr>
<tr>
<td>Nursing - NP - Geropsychiatric</td>
</tr>
<tr>
<td>Nursing - NP - Psychiatric/Mental health</td>
</tr>
<tr>
<td>Nursing - Nurse anesthetist • Nursing - Nurse midwife</td>
</tr>
<tr>
<td>Nursing - Registered Nurse</td>
</tr>
<tr>
<td>Other - Chiropractor</td>
</tr>
<tr>
<td>Other - Facility Administrator</td>
</tr>
<tr>
<td>Other - Health Informatics/Health Information Technology</td>
</tr>
<tr>
<td>Other - Midwife (non-nurse)</td>
</tr>
<tr>
<td>Other - Pharmacy</td>
</tr>
<tr>
<td>Other - Profession Not Listed</td>
</tr>
<tr>
<td>Other - Respiratory Therapy</td>
</tr>
<tr>
<td>Physician Assistant</td>
</tr>
<tr>
<td>Public Health - Environmental Health</td>
</tr>
<tr>
<td>Public Health - Infectious Disease Control</td>
</tr>
</tbody>
</table>
Enter # Trained in this Profession and Discipline: Enter the number of trainees in each profession/discipline in the textbox in Column 3.

💡 To Complete the Form: Click on the “Save and Validate” button located on the bottom right corner of your screen. If no errors are found, click on the "Submit" button in the left hand side of the EHB to begin the submission process of your PRGCA.
Printing Your Performance Report

- To print the entire performance report, expand the left side menu of your report and click the ‘Review’ link under the ‘Review and submit’ section. You will be directed to the Review page.
- Next, click the ‘Print All Forms’ button below the Resources section of the Review Page.

Figure 133. Screenshot of Printing Your Performance Report

Submitting Your Performance Report
1. To submit your performance report, expand the left side menu of your report and click the ‘Submit’ link under the ‘Review and submit’ section. You will be directed to the Submit Report. On the Submit Report page, ensure that the status of all forms is ‘Complete’ with a green check mark. Click the ‘Submit’ button on the bottom right corner of this page.

![Submit Report Page Screenshot](image)

Figure 134. Screenshot of the Submit Report Page

2. After step 1, you will be directed to the Submit Report-Confirm page. On this page, check the box under the ‘Certification’ section and click the ‘Confirm’ button on the bottom right corner of your screen to submit your report to HRSA. You will receive a confirmation message on your next screen.
Primary Care Training Enhancement Program (PCTE)

Figure 135. Screenshot of the Submit Report - Confirm Page
Appendix A: Glossary

This glossary contains general definitions for terms that are used throughout the BPMH system. Some terms may be defined in multiple ways by different programs due to their authorizing statutes and/or the nature of training activities offered. If you are unsure about how to define a term that is central to your program, please refer to the authorizing statute, the Funding Opportunity Announcement and/or your Government Project Officer for clarification.

Active Duty Military is a person who is serving full-time duty in the Armed Forces, Regular or Reserve Corps of the Public Health Service, or National Oceanic and Atmospheric Administration other than active duty for training; or a cadet at the United States Military, Air Force, or Coast Guard Academy; or a midshipman at the United States Naval Academy.

Attrition is the act of permanently leaving a training program or training activity before completion. An individual is counted as having attrited if s/he leaves a training program or training activity for any reason before completing all training requirements. This does not include those who have taken a leave of absence from a training program/training activity.

BHW-funded financial awards are monies from a grant funded by BHW that are provided to an individual by a grantee institution or organization for the purposes of defraying costs associated with participation in a training program or training activity. The types and definitions of BHW-funded financial awards are listed below:

Career Award: A financial award provided to current faculty for the purposes of facilitating professional growth and advancement in the academic setting.

Fellowship: A financial award provided to a Fellow for the purposes of defraying costs associated with advanced training in a specific content area.

Loan: A financial award provided to a student enrolled in a degree program at an educational institution for the purposes of defraying costs associated with that degree program. Loans must be repaid in accordance with terms specified in a promissory note.

Loan Repayment: A financial award provided to an individual that is conditional on their agreement to provide specific types of services for a specified amount of time. Under this agreement, an individual may have part or all of their student loans paid off so long as they meet all specified requirements.

Scholarship: A financial award provided to a student enrolled in a degree program at an educational institution for the sole purpose of covering expenses associated with tuition.
Stipend: A financial award provided to an individual for the purposes of defraying costs associated with a training program or training activity.
Traineeship: A financial award provided to a student enrolled in an advanced training program at an educational institution for the purposes of defraying costs associated with advanced training in a specific content area.

Campus-based degree program is a degree program that requires students to complete all academic coursework at the college or university campus.

Contact hours are the number of hours that an individual receives training in a specific setting.

Continuing education is a training activity or series of training activities offered to members of the current workforce who have already completed a training program in their profession. Continuing education sessions are offered to existing professionals and do not include students as primary participants.

Curriculum is the aggregate content of multiple learning activities offered by an organization in a specific topic area. Commonly, the term curriculum is used to describe the number and type of academic courses within a degree program. The term can also be used to describe the number and type of learning activities for faculty and other non-degree-bearing training programs.

Didactic training is the process of instruction between a designated faculty and an individual or group of individuals.

Direct financial support program is a type of grant that provides individuals, via grantee organizations, with a BHW-funded financial award to help defray costs associated with participation in a training program or training activity.

Disadvantaged background refers to a citizen, national, or a lawful permanent resident of the United States, the Commonwealths of Puerto Rico or the Marianas Islands, the U.S. Virgin Islands, Guam, American Samoa, the Trust Territory of the Pacific Islands, the Republic of Palau, the Republic of the Marshall Islands, or the Federated State of Micronesia who:

1. Comes from an environment that has inhibited them from obtaining the knowledge, skills, and abilities required to enroll in and graduate from a health professions or nursing school (Environmentally Disadvantaged);
   AND/OR

2. Comes from a family with an annual income below a level based on low-income thresholds established by the U.S. Census Bureau, adjusted annually for changes in the Consumer Price Index (Economically Disadvantaged). The Secretary defines a “low income family” for various health professions and nursing programs included in Titles III, VII and VIII of the Public Health Service Act as having an annual income that does not exceed 200 percent of the Department’s poverty guidelines. A family is a group of two or more individuals.
**Enhanced course or other training activity** is a specific type of training activity that was already in existence at the institution or organization and has been modified or restructured as part of the federal award.

**Enrollee** is an individual who is actively matriculated or registered in a training program or training activity. For the purposes of performance reporting, the training category of "enrollees" does not include graduates, program completers, fellows, or residents.

**Ethnicity** is the ethnic ancestry or origin of an individual or group of individuals. For the purposes of performance reporting, the Office of Management and Budget requires that ethnicity be classified as "Hispanic or Latino Origin" and "Non-Hispanic or Latino Origin". Individuals identifying as "Hispanic or Latino" are of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.

**Experiential training** is the process of instruction between a designated faculty and an individual or group of individuals that includes a component of direct work experience.

**Faculty** is an individual or group of individuals who are deemed qualified by an organization to provide instruction to others on a specific topic area.

**Faculty development activity** is generally a stand-alone single training activity provided to faculty for the purposes of additional training and/or faculty development. Faculty development activities may include conferences, workshops, or grand rounds and are not necessarily offered at the grantee institution or organization.

**Faculty development program** is a series of curriculum-based training activities that are provided to faculty over a specific amount of time for the purposes of additional training and/or faculty development. Structured faculty development programs can be degree bearing or certificate bearing and are not necessarily offered at the grantee institution or organization.

**Faculty instruction** are those courses, workshops, seminars, grand rounds or other training activities that are led by faculty for the purposes of providing training to other individuals (e.g., students, fellows, residents). Faculty instruction does not refer to training activities undertaken by faculty for the purposes of additional training or faculty development (see Structured Faculty Development Program and/or Unstructured Faculty Development Activity).

**Federally Qualified Health Centers (FQHC)** are public and private non-profit health care organizations that meet certain criteria under the Medicare and Medicaid Programs (respectively, Sections 1861(aa)(4) and 1905(l)(2)(B) of the Social Security Act and receive funds under the Health Center Program (Section 330 of the Public Health Service Act).
**Fellowship** is a training program that provides an individual or group of individuals (known as "fellows") with advanced training in a general content area. Fellows generally receive a financial award to help defray costs associated with advanced training (also referred to as a "fellowship").

**Full-time** refers to the number of days per week and/or months per year representing full-time effort at the applicant/recipient organization, as specified in organizational policy. For a student, it means one who is enrolled full time as defined by the organization. The organization’s policy must be applied consistently, regardless of the source of support.

**Graduate** is an individual who has completed all the requirements of a degree-bearing training program at an educational institution. (See "Program completer" for individuals who complete all requirements of a non-degree-bearing training program or training activity). **Hybrid degree program** is a degree program that requires students to complete academic coursework both on campus and through distance learning.

**Instructional hours** are the duration of a training activity or training program in clock hours.

**Infrastructure program** is a type of grant designed to enhance the scope, quality, and opportunities for health professions training programs or training activities. Infrastructure programs do not provide individuals with any type of BHW-funded financial awards.

**Internship** is a type of training activity that can either be: a) a component of a degree-bearing program or b) entry-level employment that provides an individual with relevant workforce experience.

**Interprofessional education** is the process of learning among a group of individuals from two (2) or more professions.

**Interprofessional practice** is the provision of care or services to an individual or group of individuals by workers from two (2) or more professions.

**Medically Underserved Community (MUC)** is a geographic location or population of individuals that is eligible for designation by a state and/or the federal government as a health professions shortage area (HPSA), medically underserved area (MUA), and/or medically underserved population (MUP). These communities have limited access to primary health care services. The term MUC is an umbrella term that can be used to describe any location that meets one or more of the previously identified designations.

**Multipurpose/Hybrid program** is a type of grant that is designed to:

1. Provide individuals, via grantee organizations, with BHW-funded financial awards to help defray costs associated with health professions training;

Primary Care Training Enhancement Program (PCTE)
2. Enhance the scope, quality, and opportunities for health professions training programs or training activities.

**Newly developed course or other training activity** is a specific type of training activity that was not previously in existence at the grantee institution or organization and was developed in its entirety as part of the grant project.

**Online degree program** is a degree program that requires students to complete all academic coursework through distance learning.

**Partner/consortium** is an organization or group of organizations that provide(s) resources and/or support to grantees for the implementation of training programs and/or training activities.

**Patient encounter** is a direct interaction between a designated caregiver and a patient for the purposes of health care.

**Practicum** is a type of experiential training activity. (See "Experiential training").

**Primary care** is the provision of integrated, accessible health services by clinicians who are accountable for addressing a large majority of personal health care needs, developing a sustained partnership with patients, and practicing in the context of family and community.

**Primary care setting** is a facility that is staffed with professionals who provide primary care. (See "Primary Care").

**Profession & discipline** identifies a general occupation (profession) and, where applicable, a type of specialty within that occupation (discipline).

**Program completer** is an individual who has completed all requirements for a non-degree bearing training program or training activity. (See "Graduate" for individuals who complete all requirements of a degree-bearing training program).

**Publication** is written material that has been submitted to and accepted by a publishing authority as part of a collection of related work.

**Race** is an individual's self-identified affiliation with one (1) or more of the following origins:

- **White** – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa
- **Black or African American** – A person having origins in any of the Black racial groups of Africa
Primary Care Training Enhancement Program (PCTE)

- **American Indian or Alaska Native** – A person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment

- **Asian** – A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam

- **Native Hawaiian or Other Pacific Islander** – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands

**Reservist** is a member of the Armed Forces of the United States Reserve Component, including the Army National Guard of the United States, the Army Reserve, the Navy Reserve, the Marine Corps Reserve, the Air National Guard of the United States, the Air Force Reserve, or the Coast Guard Reserve.

**Residency** is a training program that provides an individual or group of individuals (known as "residents") with advanced clinical training in a specialty area.

**Residential background** is/are the type/s of location/s in which an individual has established residence.

**Rural** is a geographical area that is not part of a Metropolitan Statistical Area (MSA). *Note: To determine whether a geographical area is considered rural, go to [HRSA’s Office of Rural Health Policy](https://www.hrsa.gov).*

**Structured training program** is a series of curriculum-based training activities that are provided to an individual or group of individuals over a specific period of time.

**Trainee** is an individual who participates in a training program or training activity.

**Underrepresented Minority (URM)** is an individual from a racial and/or ethnic group that is considered inadequately represented in a specific profession relative to the representation of that racial and/or ethnic group in the general population. *Note: For the purposes of the health professions, BHW considers individuals who are from the following racial and ethnic backgrounds underrepresented:*

  - American Indian or Alaska Native
  - Black or African American
  - Native Hawaiian or Other Pacific Islander
  - Hispanic (all races)
Unstructured faculty development activity is generally a stand-alone single training activity provided to faculty for the purpose(s) of additional training and/or faculty development. Unstructured faculty development activities may include conferences, workshops, or grand rounds and are not necessarily offered at or by the grantee institution or organization.

Unstructured training activity is generally a stand-alone single training activity that is not part of curriculum.

Veteran is any person who served in one (1) of the seven (7) uniformed services of the United States. The seven uniform services include: The United States Army, Navy, Air Force, Marines, Coast Guard, Public Health Service, and National Oceanic & Atmospheric Administration Commissioned Officers Corps.

Veteran - Prior Service is a person who served in an active uniformed service and was discharged or released therefrom under conditions other than dishonorable prior to reaching official retirement status.

Veteran - Retired is a person who served in an active uniformed service; was discharged or released therefrom under conditions other than dishonorable; and is entitled, under statute, to retired, retirement, or retainer pay.

Vulnerable populations are groups of individuals at higher risk for health disparities by virtue of their race or ethnicity, socio-economic status, geography, gender, age, disability status, or other risk factors associated with sex and gender.
Appendix B: FAQs

General FAQs

When is the due date for the performance report?
Performance reports are due by July 31, 2017 for all programs. No extensions will be granted beyond this date. Failure to submit a performance report by the due date may place your grant in a non-compliant status.

What dates does the performance report cover? The performance report submitted by grantees should cover all activities conducted through the grant during the current reporting period July 01, 2016 - June 30, 2017.

Is it possible to change data entered incorrectly in a prior reporting period?
No. Data entered in a previous reporting period cannot be edited. It is important that grantees provide accurate data during each reporting period.

Where will grantees be able to locate the instruction manuals for the performance reports?
Grantees will be able to access their program-specific instruction manual through the EHB. In addition, the manuals will be posted on the BHW grants website at http://bhw.hrsa.gov/grants/reporting/index.html.

Is there a way to look at the data forms required for my program without logging into EHB?
Yes. Grantees will be able to view a program-specific overview of the required performance measure forms on the BHW grants website at http://bhw.hrsa.gov/grants/reporting/index.html.

Are reports from prior years stored in the EHBs?
Yes. Grantees can locate reports from prior reporting periods in EHB by using any of the following methods:
a) Clicking the ‘view prior period data’ link within a form or under your Resources tab;
b) Going into your grant folder and searching for previously completed reports; or
c) Clicking on the "submissions" link in the left side navigation menu.

Will the information we are submitting in this reporting period be automatically used to populate the forms in the future?
Yes. Depending on the form, certain data fields will prepopulate for future reporting periods based on the data you enter when the record is initially created. For example, information reported on the EXP-1 and EXP-2 forms for training sites used will carry over each reporting period. Similarly, much of the information reported on the INDGEN form will also carry over each reporting period until the individual completes his/her specific training program or permanently leaves before completion.

**Does this report allow us to submit any attachments?**

No, you cannot add attachments to the performance report.

**When specific data, such as "N/A" is required after completing a cell, can those cells populate automatically?**

No, grantees are required to enter all data themselves due to Section 508 requirements.

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**FAQs about Technical Support & Assistance**

**Who do we contact if we need technical assistance entering data in EHB?**

Grantees should contact HRSA's Call Center for any questions related to the performance report. The Call Center can be reached via phone at 1-877-464-4772.

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**FAQs about the Training Program Setup forms**

**The wrong program name was entered last year. Going forward, should we list the correct name?**

If the grantee changes the program name, all the previous years’ data will be reset (everything entered in the past will not reappear this year). The best course of action is to make a note in the comments field and leave the program name as-is.

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**FAQs about the Program Characteristics (PC) forms**

**Do I need to set up my training program again if it is being reused in the current reporting period?**

No. If you previously reported on a training program, you do not need to set up the program again. All of your previously used training programs will be displayed in your training program setup menu with a record status of ‘Prior Record’ displayed.

**What are the status options for the different types of programs?**

Primary Care Training Enhancement Program(PCTE)
Structured and Unstructured Training programs use program status options “Ongoing” or “Complete.” All other training programs (degree/certificate, internships, fellowships, 1-year retraining, practica/field placements, residencies) use the status options “Active” or “Inactive.”

In the PC forms, do we count all trainees in our program, regardless of the year of study; do we include full-time/part-time trainees, etc.? Yes, as long as trainees are enrolled or participating in the training program identified in Column 1.

Are we required to report on trainees at our institution beyond those who are participating in HRSA-funded programs?
The PC tables capture information about the universe of trainees regardless of funding status at your school. This is the only form that collects this type of information in aggregate.

FAQs about the LR-1 through DV-3 forms

In the LR and DV tables, are the counts for graduates and/or program completers a subset of the total trainee number, or are they to be reported separately?
On the LR and DV forms, graduates and program completers are not reported as a subset of the current trainee total. Please report aggregate counts of trainees (e.g., enrollees, residents, and fellows) SEPARATELY from the aggregate counts of graduates or program completers.

Which address should we use to determine whether an individual is from a rural residential background?
The definition of rural residential background is based on whether an individual has ever lived in a rural area. Grantees may choose to use the address prior to matriculation or the institution’s address.

FAQs about the INDGEN form

Where do we get the Trainee Unique ID?
Grantees are responsible for developing a unique ID for each individual for whom an INDGEN entry is required. Grantees must keep a log of these unique IDs in order to provide follow-up data through the BPMH system.

What are the characters of the 7-digit unique ID? Each unique ID must be made up of 7 alphanumeric characters. Do not include any personally identifiable information in the ID (name, birthdate, SSN, etc.).
**Are INDGEN records from the last reporting period stored in the EHB?**
Yes; they will appear in the INDGEN table as ‘Prior Records’ until (a) the individual is marked as a graduate/program completer, or (b) the individual permanently discontinues participation in the training program.

**Last year we created unique IDs in the INDGEN table. If any of those participants attend a new training cycle this year, should we use the same code for that participant?**
The purpose of the Unique ID is to track an individual’s training participation over time. If the same individual is simultaneously participating in multiple training programs, you should use the same unique ID. Note that each training program must also have a unique name. The same “unique ID-training program” combination cannot be present more than once.

**What if an individual already listed on INDGEN did not receive a financial award during the reporting period?**
If an individual from a prior record did not receive a financial award during the current reporting period, please indicate this under Column 12. The record will remain on INDGEN until this individual is marked as a graduate/program completer or permanently leaves the training program prior to completion.

**Is reporting the underrepresented Asian distinction no longer included?**
The definition of an underrepresented minority (URM) included in the instruction manuals specifically states that a URM is "is an individual from a racial and/or ethnic group that is considered inadequately represented in a specific profession relative to the numbers of that racial and/or ethnic group in the general population". While some professional or accrediting organizations collect detailed information on Asian subpopulations, data sources for the general population (i.e., the Census) do not. Therefore, it is not possible to determine that specific Asian subpopulations are underrepresented relative to the general population. Furthermore, federal agencies have been directed by the Office of Management and Budget to collect race/ethnicity data in a manner consistent with that used for the Census. As a result, all race and ethnicity categories displayed in the INDGEN sub-form are identical to those used in the Census.

**Can we use our institution’s definitions/standards for disadvantaged background?**
The BHW definition of disadvantaged background is included in the glossary of each instruction manual. As long as an institution’s definition or standard does not contradict the federal definition of disadvantaged, then grantees may choose to count individuals who have been deemed disadvantaged by the institution. Otherwise, you must use the definition for disadvantaged background located in your program manual glossary.

**Do we report full time faculty who receive salary support for teaching or administrative responsibilities?**
If the faculty member is already accounted for in the grant’s personnel log, then do include this individual on the INDGEN table. If the faculty member who received financial support is not listed in the grant personnel log, then he/she should be reported on INDGEN.
Do conference registration fees count as financial support? Yes, but only for non-project staff.

How do we find out an individual's family income?
The institution's financial aid office should have that information, as part of the required application for financial aid.

For veteran status, are we asking only for the trainee's status, or the trainee's family status (e.g. dependent of veteran, spouse of veteran, etc.)? Only the trainee's status should be reported.

How is the academic year funding total calculated?
Once you have validated the form, the academic year total is automatically calculated in EHB as the sum of funding during the academic year.

How is the cumulative funding total calculated?
The cumulative funding total is automatically re-calculated each annual reporting period in EHB. This is the total of each annual amount that has been entered for the individual record either (a) across the life of the grant or (b) since the BPMH system has been in use, starting with Academic Year 2012-2013.

Can I cut and paste rows in the INDGEN table?
The cut and paste capability is currently set up at the row level, rather than individual data elements. After a row of data has been copied and pasted, edits will need to be made to individual cells using the dropdowns. Please note that the system does not accept data that has been cut and pasted from sources outside the report itself.

Do we include faculty or preceptors on this form?
If direct funds were given to the individuals AND the individuals were not already included in the grant application, then yes, include them on INDGEN. Otherwise, do not include them.

In INDGEN Column 13, Stipend, should we include salaries?
The individual's salary (unless it’s paid by the grant) should not be included. However, the BHW funding should be included.

On the prior report we indicated that a trainee graduated when he had not. Because of that, he is not showing up on the current report. Can he be moved back to the INDGEN form?
If the individual moves to the INDGEN-PY form you can locate the record of the mislabeled graduate. Scroll all the way to the right, and use the link called “Move to INDGEN”, which will allow you to reset that record back to the INDGEN table for continued reporting.
I submitted a report last year using the 'not reported' option for trainee demographics. Why am I getting an error this year?
You may only select the 'not reported' option during the first reporting period for each trainee. Demographics are required information and grantees are expected to collect and report the information in all subsequent reports.

**FAQs about the INDGEN-PY form**

**How do I use the INDGEN-PY form?**
One year after an INDGEN record is marked as a graduate/program completer, you will be asked to provide an update on the individual’s employment/enrollment status.

**FAQs about the Experiential Training (EXP) forms**

**Which training sites do I need to report on this form? Is it all of the sites our program uses?**
Grantees should report only on sites used to provide training to students, trainees, or faculty supported by the grant during the current reporting period.

**Our hospital provides multiple training sites for our trainees. Do I list the hospital or the specific clinics and offices within the hospital?** You should list the specific clinics and offices within the hospital that provide training to supported trainees.

**Do I need to list a site more than once on EXP-2?**
For sites that provide training to students, trainees, and faculty from different training programs, the site should be listed on the form for each training program the grant sponsors.

**How can I report interprofessional team-based care at the training sites?**
Interprofessional team-based care reporting is a three-step process on the EXP-2 form. After identifying the training program and site, the first step is to select ALL of the professions and disciplines represented on the interprofessional team (including that of the principal HRSA-sponsored trainees). The second step is to provide the number of trainees (by discipline) who were trained by the HRSA-sponsored program (principal trainees). The final step is to provide the number of other trainees (by discipline) who participated at the site, alongside the principal trainees, but who were not enrolled in the HRSA-sponsored program.

**What training sites do I report on EXP if I don’t have directly-funded individuals in INDGEN?**
You should report all training sites used to train individuals touched by your grant funding. If no individuals are reported in INDGEN, consider those you reported on the LR-1 form.

**The values I added in EXP-1 aren’t prepopulating in EXP-2. Why can I only see my active prior records?**

You must select each program-site combination using the drop down menus in columns 1 and 2. The values you added in EXP-1 will load in the dropdown menu in EXP-2 column 2.

**Why do I need to enter the zip code of my training sites?**

The zip codes allow HRSA to identify sites that are in rural areas, medically underserved communities, and health professions shortage areas. Because the designation of each location may change over time, the zip code allows HRSA to adjust the way it labels a site.

**Where can I find the 4-digit zip code extension?**

You can locate your site’s 4-digit zip code extension by visiting the US Postal Service website: https://tools.usps.com/go/ZipLookupAction_input

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**FAQs about the Curriculum Development and Enhancement (CDE) forms**

**What if courses are created using a variety of funding sources?**

Grantees should complete a CDE-1 entry for each course or training activity that was developed or enhanced using any amount of HRSA grant funds.

**For CDE-2, do we report on all attendees or only those directly funded by a BHW-funded program for this reporting period?**

For the purposes of the CDE-2 form, count all individuals trained (whether or not the individuals received direct financial support) through courses or training activities developed or enhanced using any BHW funds during the current reporting period.

**In the CDE-1 table, I have entered a course that has been implemented, but when I try to select the site where the course was taught, I receive an error message that based on my responses for columns 2 and 4, this site is not allowed. Shall I use N/A as the site?**

If it is an academic course or training/workshop for health professions students, fellows, or residents, then N/A will need to be used.

**Can I delete a course from last year?**

You will not be able to delete a previously used course. You may indicate that the course from last year was not used again this year.
FAQs about the Faculty Development (FD) forms

What is the difference between a structured faculty development program and an unstructured faculty development activity?
Structured and unstructured faculty development programs differ in a few ways. Generally, structured faculty development programs are administered over a longer period of time and involve multiple meetings/sessions. Additionally, structured programs tend to be curriculum-driven, and may lead to the conferral of a degree or certificate. In contrast, unstructured faculty development activities are shorter in duration and are single, stand-alone trainings. Faculty development activities include conferences, workshops, and grand rounds.

What are the definitions for the roles of educator and administrator?
The educator role deals with instruction and training, course preparation, grading, and generally involves imparting knowledge or skills to others. Administrative responsibilities are support functions, such as committee work.

FAQs about the Continuing Education (CE) forms

For CE-2, do we report on all attendees or only those directly funded by a BHW-funded program for this reporting period?
Count all individuals trained (whether or not the individuals received direct financial support) through courses or training activities developed or enhanced using any BHW funds during the current reporting period. Individuals attending CE trainings should be current providers, rather than students.

In creating and enhancing courses for continuing education, what should the site be? Enter N/A for these courses.

When should I use the ‘Other’ option for type of continuing education?
The ‘Other’ option is available if there was a CE activity that the grantee does not identify as an unstructured training or structured CE course. We anticipate that few (if any) grantees will need to use this option.